HY826

Technology Edition

AI Everywhere

The Hotel Yearbook

Foresight and innovation in the global hotel industry

COLOPHON

The **2026 HOTEL Yearbook Technology Edition - AI Everywhere** is fully geared towards AI and explores how hospitality technology is preparing for a decade of profound change. With a clear focus on practical impact rather than hype, this edition examines how intelligence is becoming embedded across the hotel technology stack and day-to-day workflows, reshaping operations, revenue, distribution, guest experience, and the back office.

GUEST EDITOR-IN-CHIEF

Simone Puorto
info@simonepuorto.com
simonepuorto.com

PUBLISHER

Hospitality Net
Maastricht, The Netherlands
www.hospitalitynet.org

REPRODUCTION

INTRODUCTION

Every year, the HOTEL Yearbook sets out to capture the ideas, forces, and conversations shaping the future of our industry. This 2026 AI Edition reflects both the growing importance of artificial intelligence in hospitality and the quality of thinking now being applied to it.

This edition took shape under the guest editorship of Simone Puorto, whose combination of industry experience, knowledge of AI, and professional network made him well placed to bring together this year's cohort of contributing authors. The breadth and quality of perspectives represented in these pages are a direct result of his work.

Before you dive in, make sure to check out the two bonus segments accompanying this edition. The first is an overview of 30 new AI applications for the hospitality industry, a practical look at the tools and platforms currently reshaping how hotels operate, communicate, and serve guests. The second is a glossary of AI industry terms and slang, a useful reference for navigating the terminology of AI. Both are worth your time.

Artificial intelligence is no longer a horizon topic for hospitality. It is now being adopted, and it raises real questions for operators, strategists, and technologists alike. I hope this edition helps you think through those questions.

My sincere thanks go to Simone Puorto for his work as Guest Editor-in-Chief; to all of this year's contributing authors for sharing their expertise and perspectives with our readership; and to my team at Hospitality Net, who make this annual publication possible.

Happy reading!

Henri Roelings
Publisher, HOTEL Yearbook
Founder, Hospitality Net

Foreword by the Editor-in-Chief: The Olympia Effect

Simone Puorto
Head of Emerging Trends and Strategic Innovation, Hospitality Net

REVERSE UNCANNY VALLEY, STADE DU MIROIR, AND HUMANS-AS-LUXURY IN THE FUTURE OF HOSPITALITY

> *He had never had such a perfect listener. […] She stared fixedly at her lover for hours on end, without moving a muscle, and her gaze grew ever more ardent and more animated.*
>
> *— E. T. A. Hoffmann, Der Sandmann*

INTRODUCTION

One of my favorite short stories of all time is Der Sandmann by German Romantic author E. T. A. Hoffmann. At first reading, it is a Gothic tale about childhood trauma, but beneath the surface lies something far more unsettling: a philosophical autopsy of the fragile boundary between the human and the artificial, and, perhaps, a cautionary tale about the hospitality of tomorrow.

THE TALE OF OLYMPIA [SPOILER ALERT]

The story follows Nathanael, a young student haunted by childhood memories tied to Coppelius, an acquaintance of his father whom he associates with the folkloric Sandman, the creature said to steal the eyes of children who refuse to sleep.

One night, Nathanael secretly witnesses Coppelius and his father conducting strange alchemical experiments. Soon after, his father dies, and Coppelius disappears.

Years later, Nathanael encounters an Italian optical salesman named Coppola, whom he immediately suspects to be Coppelius under another identity. Around the same time, he falls deeply in love with Olympia, the beautiful daughter of one of his professors, despite the fact that everyone around him senses something profoundly unnatural in her behavior. Eventually, the horrifying truth emerges: Olympia is not human at all, but an automaton created by Coppola and the professor.

DAS UNHEIMLICHE

What makes Der Sandmann extraordinary is not simply that it introduces one of literature's earliest automatons. Hoffmann is not interested in robots in the Asimovian sense. Instead, he destabilizes the very criteria through which we recognize humanity itself. And, when read through the lens of hospitality, the story anticipates, by almost two centuries, the human-machine tension only now emerging within an industry built on the granitic assumption that "human beings serving other human beings" ("H2H") is fundamentally irreplaceable.

The genius of Hoffmann lies in the fact that Olympia is not, at least initially, presented as obviously artificial, and the horror unfolds almost imperceptibly. At first, she appears refined, elegant, composed, and attentive. In many ways, she is the perfect host: always listening, never interrupting, endlessly patient, "completely invisible, yet always in sight," to quote Wes Anderson's The Grand Budapest Hotel.

Only gradually do we, as readers, begin to sense that something is wrong. Nathanael, meanwhile, remains the only one who truly fails to recognize what Olympia is (and is not), because he cannot psychologically afford to see it. His desire overrides his perception, and the uncanny emerges not simply from artificiality itself, but from his willingness, perhaps even his need, to emotionally collaborate with the illusion.

THE FIRST LEVEL: THE UNCANNY VALLEY OF PERFECT CUSTOMER SERVICE

The first layer of uncanniness in Der Sandmann is perceptual. Long before robotics professor Masahiro Mori formulated the "Uncanny Valley" theory (the psychological phenomenon in which robots, CGI characters, avatars, or even conversational AI systems appear nearly human, yet remain subtly "off" in a way that triggers unease, revulsion, or cognitive dissonance), Hoffmann had already intuited its core mechanism: Olympia appears almost human, but not entirely. And the uncanniness emerges precisely from that single adverb: "almost." It is no coincidence that Freud later used Hoffmann's story in his essay Das Unheimliche (The Uncanny).

Back to our industry, anyone who has interacted with a hotel chatbot, an AI concierge, or a CRM recognizes this sensation immediately: the greeting uses your name, the syntax is flawless, the tone is warm, on-brand, and professionally empathetic, and yet something feels strangely unnatural.

This is Hoffmann's Paradox: the closer artificial service comes to perfectly simulating humanity, the more visible the absence at its center becomes.

THE SECOND LEVEL: OLYMPIA AS THE IDEAL HOSPITALITY WORKER

The second level of Hoffmann's uncanniness is relational, and here things become genuinely disturbing. Olympia behaves in a way that perfectly accommodates Nathanael's desires: she listens endlessly, never interrupts, contradicts, or resists interpretation.

Sounds familiar? Models like ChatGPT are intentionally trained to maximize conversational pleasantness. Through mechanisms such as Reinforcement Learning from Human Feedback, these systems are rewarded for producing responses that feel helpful, agreeable, supportive, but also almost entirely frictionless, thereby creating a (dangerous) bubble of self-reference.

In this sense, Hoffmann seems to anticipate something Hegel was elaborating around the same period: the idea that self-consciousness emerges only through the encounter with another consciousness that resists us. Nathanael, deprived of this resistance, collapses inward, spiraling deeper into his own biases, because nothing outside him ever forces him to leave the comfort of his own self.

HOSPITALITY IS LACANIAN (OR WE'RE ALL JUST LITTLE BABIES IN A LOBBY)

And this brings me to the next point. I have said this many times: I believe hospitality is profoundly Lacanian. In French psychoanalyst and psychiatrist Jacques Lacan's theory of the stade du miroir, children initially experience the world as something perfectly aligned with their own needs. Hunger appears, and food arrives. The baby cries, and the mother shows up.

For a brief moment, we all experience reality as if it revolved entirely around ourselves, and (good) hospitality succeeds when it is able to recreate something similar by temporarily restoring the fantasy that the world revolves harmoniously around our existence, that our desires matter, and that they should be fulfilled immediately. We become, once again, the center of the universe.

Because we are all, without exception, just little babies in a lobby.

But mirrors require invisible labor: for the guest to inhabit this illusion of centrality, someone else must absorb the complexity behind it. The ideal service interaction is, therefore, one in which the employee appears just human enough to simulate warmth, but not human enough to disrupt the fantasy. And this is precisely why Olympia is so unsettling: she is not the opposite of the hospitality ideal; she is hospitality on steroids, a perfectly optimized surface for narcissistic reflection (and isn't "optimized surface for narcissistic reflection™" a great tagline for a luxury hotel brand?).

The difficult question today is whether guests, when given the choice between resistant human interaction (in the Hegelian sense) and non-resistant artificial interaction, will increasingly make the same choice Nathanael made. In my paper "Humans-as-Luxury: The Future of Hospitality in an AI-Driven Age," I argued that the answer would be no. But I am no longer so sure...

THE THIRD LEVEL: THE TELESCOPE AND THE ALGORITHMIC GUEST EXPERIENCE

The third level of uncanniness is mediation. Der Sandmann is saturated with devices of augmented reality: spectacles, lenses, telescopes, binoculars. Nathanael never truly sees something; he always sees through something. And paradoxically, the more technologically enhanced his perception becomes, the less capable he is of distinguishing reality from delusion.

In many ways, Coppola's recurring cry, "Pretty eyes! Pretty eyes!", while selling optical instruments throughout the story, feels like the nineteenth-century ancestor of Zuckerberg's Ray-Ban Meta Smart Glasses: technologies that promise enhanced perception while simultaneously rewriting reality itself. The parallel with contemporary hospitality is difficult to ignore: guest data platforms, sentiment analysis tools, AI-powered upselling engines, and predictive personalization systems continuously filter, score, segment, and reconstruct the guest into a curated profile designed for optimization and action, a simulacrum.

THE FOURTH LEVEL: ARE THE HOSTS MECHANICAL TOO?

Yet the story's most disturbing movement arrives at its deepest ontological layer. The scene that still sends chills down my spine to this day is not the revelation that Olympia is an automaton, but the childhood episode in which the evil Coppelius manipulates Nathanael's body as if the child himself were assembled from artificial parts. At that moment, the uncanny reverses completely. Now, let's consider what already happens to human service workers inside heavily automated hotels: greetings are scripted, interactions timed, sentiment monitored through AI, and deviations from protocol flagged automatically. Upselling suggestions are generated by revenue systems, schedules are optimized by algorithms, and feedback scores are tracked in real time and tied directly to performance reviews. Human-on-the-loop at best. Human-out-of-the-loop at worst. The perfect receptionist of tomorrow is, de facto, Olympia.

"REVERSE UNCANNY VALLEY" OR THE "OLYMPIA EFFECT"

And this is what I call the "Hospitality Reverse Uncanny Valley," or the "Olympia Effect." My concern is the inverse of Mori's: humans becoming so optimized, scripted, emotionally regulated, and system-dependent that they themselves begin to feel artificial. The empty smile repeated 300 times per shift, the receptionist staring more at the PMS than at the guest, the heads-down "How are you today?" delivered with the cadence of a notification system. We have all experienced it as guests, haven't we?

Long before AI, hospitality had already perfected the art of the emotionally optimized mask. As Octavio Paz observed in The Labyrinth of Solitude, the repeated social smile eventually ceases to be expression and becomes defense, ritual, and, ultimately, armor. And the timing is not accidental: we are entering this phase precisely as worker disengagement is exploding globally. Quiet quitting, burnout, emotional exhaustion, chronic understaffing: hospitality is especially vulnerable to all of it. The paradox is almost cruel: the more hospitality systems attempt to engineer perfect emotional consistency, the more emotionally absent the workforce itself risks becoming.

PHILOXENIA AND THE HOTELIER'S OATH

Now, let's go back a few more centuries: the word "hospitality" derives from the Latin "hospes," a term that simultaneously means "host" and "guest," "stranger" and "welcomer." Embedded within the word itself is the recognition that hospitality was never merely transactional, but rather relational, and profoundly human. For the ancient Greeks, this bond was sacred: philoxenia, the love of the stranger. A moral obligation toward the unknown other. I have often said that perhaps hospitality should have its own "Hippocratic-Hotelier's Oath": a commitment to preserve the sacredness of the H2H relationship at the center of the industry. The real dystopia of Der Sandmann is not that machines might eventually become perfect hosts, but that we might stop noticing the difference. Or worse: that, not unlike Nathanael, we might notice, and prefer it anyway.

ABOUT THIS EDITION OF THE YEARBOOK: THE GOTHIC FLATLINE

The initial editorial idea for this edition of the Yearbook came to me after reading Flatline Constructs: Gothic Materialism and Cybernetic Theory-Fiction by British writer, cultural theorist, and philosopher Mark Fisher. In it, Fisher introduces the concept of the "gothic flatline," a liminal zone where distinctions between the animate and the inanimate, the human and the artificial dissolve. The more I reflected on that idea, the more I realized how profoundly it resonated with the historical moment hospitality is now entering, and this Yearbook was conceived as an attempt to explore that unstable territory. Rather than offering simplistic predictions or techno-utopian narratives, this edition brings together philosophers, technologists, futurists, designers, strategists, architects, and hospitality leaders to collectively think through the uncertainty of the present.

Contributors such as Zoltan Istvan, Leonardo Caffo, James Watson, and Jonathan MacDonald approach the future from radically different perspectives, creating not a single ideological narrative but rather a kind of intellectual constellation. Structurally, the Yearbook follows the arc of the guest journey (pre-stay, mid-stay, and post-stay), with one underlying conviction: that the future of hospitality will no longer be definable exclusively from within hospitality itself.

Compiling this edition has also been, on a personal level, an extraordinary intellectual journey. Many of the ideas in these pages challenged my own assumptions, expanded my thinking, and forced me to confront how unstable many of our conceptual categories are becoming. I learned an enormous amount while reading, editing, organizing, and reflecting on these contributions. No filter bubbles here, dear reader. No algorithmic reassurance loops. No "Olympia silently reflecting your own assumptions back at you." I genuinely hope that, while reading this Yearbook, you experience at least part of the same curiosity, intellectual vertigo, excitement, and sense of discovery that I felt while putting it together.

Enjoy the ride.

Preface I: The Post-Human Traveler: Redefining the Guest

Zoltan Istvan
Public Figure in Transhumanism, Zoltan Istvan

Zoltan Istvan challenges the hospitality industry to think beyond its most basic assumption: that its guests will remain human. From life extension drugs and brain implants to humanoid companions and autonomous AI entities, he maps a transhumanist future that renders current notions of the guest experience — and the guest itself — genuinely obsolete.

For centuries, the hospitality industry hasn't changed much. Hotels, for example, typically provide people with a place to stay overnight in a safe, comfortable, and convenient setting. They haven't changed much because people haven't changed. After a long day toiling in a foreign place or exploring a new one, tourists want to return to a clean, safe place to regenerate.

But what happens when human beings fundamentally change? And I mean really change, like in the transhumanist sense. What happens to hospitality in a post-human existence? For example, what happens in the future when technology and modern science have eliminated sleep, something various companies are already working on in California, where I live? What happens when the need for food is eliminated from the human body because we now possess plant DNA and cells that allow people to photosynthesize energy from the sun, something transhumanists are already experimenting with?

The foundation of the hospitality industry is based on humans remaining humans. But as everyone can tell from how fast the world is changing, people may not remain so-called mammals much longer, almost certainly not by the end of this century. I expect some people to become cyborgs, digital avatars, cloned entities, humanoids, and even uploaded consciousnesses merged with AI.

So, how shall we approach the world of hotels and hospitality, something I am very keenly involved in as a professional speaker who constantly travels?

Let me take a step back, though, and fully introduce myself, so there is context for my wild forecasts and my lifelong love of travel. My first job out of college was with National Geographic, where I covered international stories as a reporter for their television channel and website. My stories ranged widely, from interviewing witches in Bolivia to covering the Olympics in Greece to risking my life filming war in Pakistan. I've had the experience of being attacked by pirates off Yemen, toured the Killing Fields of Cambodia, and fought for the forest in Paraguay. I even invented the sport of volcano boarding in Vanuatu, which went viral and is now practiced worldwide. In all, I've traveled to over 108 countries.

Despite my journalism career, today I'm best known around the world as a transhumanist, someone who advocates for merging people with machines and radical science. I've given talks all over the world, including at the World Bank, the World Economic Forum, and the UK Parliament. Additionally, my recent graduate degree at the University of Oxford focused significantly on Artificial Intelligence. Perhaps no other field is more transhuman than the way AI is upending our lives.

At the center of all my futurist work is a love for the novel, whatever is new, curious, and interesting. Much of the travel and hospitality industries cater to those exact concepts, too. Without it, hotels would just be cages, protected from outside forces. Instead, many of the best hotels are fascinating, joyful experiences in themselves.

So how does the future pertain to such a thing? Let's start with what is likely to happen in the next 15 years, something not too far out, but enough to already plan for. For starters, AI is ushering in extensive new ways to combat disease and aging. Next year, it's quite likely that some of the very first life extension drugs will be FDA-approved, and people will start living statistically longer because of it. Studies in mice and other animals show that certain drugs can elongate life by upwards of 30%.

But that's just the start. AI is likely to uncover new drug molecules over the next three years that could double our lifespans, and eventually eliminate aging altogether. The number one goal of transhumanists, including myself, is not to die. Using science to stop this process will surely change our world soon. When I first got into transhumanism as a public figure, about 15 years ago, the longevity industry was worth a few billion dollars. Today, Bank of America suggests it could already be worth $500 billion. Notably, a handful of billionaires, like Jeff Bezos, Mark Zuckerberg, and Peter Thiel, are actively funding longevity startups.

Considering all this, how does the hotel business change for a person who no longer ages? Does this mean there will be repeat customers for eternity? Loyalty becomes a far more powerful concept. Of course, certain hotels are already specializing in longevity hospitality, where staying at this kind of lodging is the main purpose, not just a place to stay overnight.

But transhumanism is about far more than just life extension. In Silicon Valley, where I make my home, Meta (Facebook's parent company) has spent billions on virtual reality, Elon Musk's Neuralink is spending billions to get people to upload their thoughts into machines, and OpenAI can give you best friend chatbots and maybe soon virtual partners too.

Blockbuster science fiction movies like Total Recall and Ready Player One have already introduced the public to a society overindulging itself with virtual reality. Hospitality becomes entertainment without leaving your couch. Hotels are virtual, yet they still charge money. Naturally, to run this type of business, there would be almost no overhead, especially as AI is likely to design and maintain everything, as is already the case in some instances.

Companies like Neuralink are actively conducting human trials, so that such virtual worlds are not just experienced through a headset you can put on and take off, but are always accessible to your brain through cranial implants. I have a chip in my hand that eliminates the need for car and house keys and can be used to locate me and pay at some stores. It may compromise some of my privacy, but I believe the convenience of using it outweighs that. In the future, I think everyone will get brain implants, as communication and access to AI will then exist directly in our thoughts. I imagine that within 15 years, this will likely be possible.

It's possible we could get the effects of staying in a top-tier hotel just by downloading the experience into our heads. In fact, like a drug, this might become very popular, just as people scroll on their phones endlessly or watch TV. At Oxford, my professor posed a challenging question: if you could be shot into space in a box and guaranteed to be happy forever, living in a programmed dream world, would you do it? A surprising number of people said "yes." This bodes well for the hospitality industry moving forward.

Here's something else that's going to happen within 15 years: humanoid companions. There are already places where you can go and meet sexual partners that are bots. Some fringe people are already marrying these AI bots. Probably within five years, unless you are using a magnifying glass, you likely will not be able to tell a humanoid robot from a real person. Surely many millions of lonely people will opt for this, especially as young people grow more isolated, according to studies. A dark but famous movie on the subject is called The Stepford Wives.

With this in mind, how will accommodation change if one member of a couple is not human? They don't need to eat, shower, use the restroom, or drink at the bar. But take this one step further: there are already millionaire AI bots roaming the web, making money with little or no human involvement. Within a few years, fully autonomous AIs will dominate the digital universe, potentially by the billions. Many of them will likely be far smarter and more creative than people, and they will host their own economy among themselves. These bots may even want vacations for themselves, and surely some will take physical form via robots.

Will the hospitality industry cater to this? Will there be civil rights issues, including moratoriums on such beings? Whatever happens, the hotel business will likely do better with more customers, regardless of whether they are human or not. Besides, many of these businesses will already be employing robots and AI assistants, adding another layer of ease to this new perspective on the hospitality industry.

Bear in mind, though, the future isn't just about bots. Perhaps more famous than any other scene in the Star Wars saga is the Tatooine bar scene with all the strange creatures that Han Solo visits. With CRISPR genetic editing and scientists already working on creating synthetic DNA, it wouldn't surprise me if it's not just robots vs. people, but robots vs. people vs. new, enhanced, hyper-intelligent creatures.

But beyond world wars and other existential planetary threats, regardless of who is what, it'll still be the economy that motivates nearly everyone. And if there's money to be made, then people will offer hotels and other mainstays of the hospitality industry.

In fact, I surmise that new fortunes will be made by being the first to target these emerging markets for AI vacations and virtual reality holidays. Additionally, existing markets and companies might gain publicity by being the first to open their businesses to such ideas.

Like it or not, we can't change how fast the future is coming. The way we think we understand the world will absolutely change within the next 15 years, and frankly, it could be unrecognizable by the year 2100. Rather than distance ourselves from the chaos that's coming, we should aim to open our minds, see where we can make some healthy profit, and generally just enjoy ourselves. After all, we are entering the most interesting time ever to be alive.

HYB

Preface II: The Last Virgin Space: Aesthetic Resistance in the Age of AI-Mediated Travel

Leonardo Caffo
Professor of Art and Philosophy, Pegaso University (Italy) / Director of Rethinking Lampedusa Research Centre (Made Program University), Made Program University

M A —DE Program | Accademia di Belle Arti Rosario Gagliardi Siracusa

Leonardo Caffo argues that AI and algorithmic image saturation have made pure aesthetic experience, the genuine "wow" of discovery, effectively impossible for the modern traveler. Yet rather than mourning that loss, he proposes a radical reorientation: the last virgin space of authentic experience is not the destination itself, but the friction between what AI leads us to expect and what reality actually delivers.

> *Philosophy alienates itself from itself;*
> *it arrives at its beginning, at immediate consciousness,*
> *which is precisely the scission.*
>
> *— Hegel*

It is widely recognized how challenging it is to reach a consensus on the definition of a “pure” aesthetic experience. By “pure,” we mean, in more technical philosophical language, an encounter between subject and world that is not mediated by any pre-perceptual expectation that might influence the experience of the landscape we are about to observe.

For instance, today it is impossible to see the Eiffel Tower without having already been exposed to an almost infinite array of images of the monument from films and social media prior to visiting Paris. The subject already knows what to expect, perceptual purity seems to be lost, and the idea of the traveler as a discoverer of universes is significantly diminished.

It is equally well known, therefore, that pure aesthetic experience appears to belong only to children and animals. The “wow” of astonishment, something that truly conveys the sensation of the first time, the unimaginable, the unexpected, seems entirely inaccessible to adult humans, especially in the wake of the dictatorship of images and AI in our digital contemporaneity.

Two trajectories present themselves: a defeatist and frankly naive one, which posits that AI deprives us of authenticity, a claim true for every technology throughout history, without, however, adopting a truly radical position (cf. the Unabomber). The alternative is a more nuanced, pragmatic path capable of coexisting with the new, seeking to integrate the concept of aesthetic experience with the defining features of our contemporary form of life.

Let us begin by defining, technically, what constitutes an aesthetic experience:

A is an aesthetic property of x if, and only if, A is an intrinsic property of x deemed worthy of attention (perception and/or reflection) within a specific culture C.

An observation or gesture is aesthetically relevant if, and only if, it directs attention toward an aesthetic property of an object or event.

A person has an aesthetic experience of x if, and only if, that person responds to an aesthetic property of an object while being aware that a specific culture C designates it as an aesthetic property.

Heidegger posits that to perceive something in a purely aesthetic, and thus entirely disinterested, manner, one must view it simply “as” that something.

It goes without saying that for the modern adult, experiencing something with pure wonder, unburdened by an avalanche of preconceptions, is a chimera. At most, this occurs when someone plays a trick on us, startling us by suddenly leaping out from behind a door. In that gasping “ah” of sudden shock, there lies something akin to the “wow” of the child or the animal.

The contemporary traveler, therefore, is precisely this tension, a taut string stretched between the child animal and the aesthetic void adult.

Yet, thankfully, AI, much like the broader world of images, remains fundamentally imprecise and devoid of absolute certainty. What we are witnessing, and what we might conceive, is a profound challenge.

Imagining setting off without knowing what we are going to see beforehand… impossible.

But the aesthetic experience we will arrive at, let’s call it a compromise, is that of demonstrating the value of the subjective (my experience) in relation to the presumed universal experience of AI (The Experience), and, furthermore, attempting to realize an idea of an anti-Diary in the style of Bruce Chatwin:

> *I had been told the Eiffel Tower was like this, but instead it was like this.*

This trajectory of thought is extremely fruitful for the ethics of travel. If we accept that the phenomenological “purity” of aesthetic experience is unrecoverable, a victim of iconographic saturation and algorithmic pre-mediation, then we must shift the center of gravity of the aesthetic experience itself.

We no longer seek the object “in itself,” the landscape (which, in any case, is always a form of compromise between the eye and the world), but rather the nature of the gap.

If AI provides the “Universal Experience,” a statistical mean distilled from the infinite, the optimized prompt, the canonical vantage point, then contemporary aesthetic experience no longer resides in the naive discovery of the world. Instead, it is situated in the meticulous, often painful, calibration of the discrepancy between simulation (the AI-generated expectation, the curated social media feed) and reality (the raw, messy contingency of sensory experience).

If AI functions as the grand apparatus for the homogenization of the imaginary, the only space where the human can experience a “purity” that is not pre-packaged is no longer the encounter with the monument, which is already tainted by its hypermediation, but the precise instant where the real fails to coincide with its representational ghost.

The contemporary traveler is no longer an explorer of terra incognita. They are, more modestly yet more radically, a cartographer of the gap.

Aesthetic experience shifts from the object to the friction. When I observe, "I was told it would be like this, yet it was like that," I am performing an aesthetic act of reclamation. I am asserting that my subjectivity holds weight precisely because it has detected an error in the AI's universal calculation.

The child's "wow" is transfigured into the Epicurean clinamen, the unpredictable swerve of the falling atom, the anomalous rupture that disrupts the predicted trajectory.

The traveler is no longer one who "goes to see," but one who "measures the discrepancy."

In this sense, aesthetic experience becomes an act of active resistance.

Simulation (AI/social media) seeks the maximum convergence between desire and vision. It is a shortcut designed to erase the "noise" of the world.

Contemporary travel, conversely, deliberately seeks that noise. It feeds on what the algorithm cannot predict, for algorithms cannot calculate misfortune, meteorological caprice, hunger, or fatigue.

While the traditional diary was a log of events ("I was here, I saw this"), the Anti Diary is a phenomenology of failure.

It is no longer about recording that "the Eiffel Tower is beautiful." It is about mapping the disappointment, or the jarring surprise, relative to the canon.

This operation shifts the center of gravity from the world back to the subject. If the world is saturated with images, the only space still virgin, still uncolonized by algorithmic capital, is the subjective reaction to incongruence.

To state, "It is exactly as I expected," is the death of the aesthetic. It is the confirmation of the AI's victory.

To declare, "It is terrifying, it bears no relation to the photograph I saw," is the awakening, the moment consciousness severs itself from the representation.

We are facing a new form of ascesis.

The "error checker" traveler does not seek the exotic in the geographic sense, for every coordinate on the map has already been saturated by pre-mediation. They seek the exotic in temporal tension.

Aesthetic experience, therefore, no longer resides in what we see, but in the diachrony between the image model (which we carry with us as a phantom) and the reality event (which confronts us).

It is an exercise in critical consciousness that demands courage: one must be willing to relinquish the reassuring beauty of the "canonical view" to gain the brutal truth of the "contingent vision."

In a world where AI constantly offers the "corrected version" of reality, the task of the human paradoxically becomes to be the "glitch in the system."

To know the world and to travel, now means to be lost without the intention of being found.

To recover that spark we believed was lost, we must cease traveling to "add" experiences to our personal archive, an act dictated by the capitalism of platforms that demands the accumulation of data, photos, and check-ins.

We must begin to travel to subtract.

Every time we resist the desire to frame the landscape as AI would, every time we pause to observe the "wrong" detail, the grime, the unexpected, the mundane imperfection, we are asserting our freedom.

Aesthetics is no longer an act of passive admiration, but one of radical opposition.

The "wow" is no longer wonder at the magnitude of an object, but the astonishment of realizing that, despite everything, the world remains more real than its representation.

This is the final margin in which the human is salvaged, and travel returns to being an aesthetic experience in the only sense still possible for an adult life imprisoned by language.

HYB

The Future of Hospitality Depends on Human AI Literacy

Pre-Stay

Ian Millar
Senior Lecturer Hospitality Technology, EHL

EHL

Ian Millar argues that AI has already taken control of the pre-stay guest journey and that the hospitality industry's most urgent challenge is not technological adoption but the development of genuine AI literacy among its leaders. Rather than treating AI as an IT concern, Millar makes the case that understanding data, prompting systems, exercising critical judgment, and maintaining human oversight are now core leadership competencies. The hotels that will thrive are not those with the most automation, but those with the organizational discipline, shared accountability, and cultural mindset to teach machines well and know when to override them.

The three main phases of the pre-stay journey are already forms of human-to-machine interaction. Future guest searches are AI-curated, booking decisions are heavily influenced by algorithms such as those used by Booking.com, and the first interactions are often no longer human. So this human-to-machine interaction is already a reality. The real question is whether we are managing it correctly or getting it completely wrong.

Examples are everywhere. Inconsistent room descriptions lead to poor recommendations, bad tagging creates irrelevant upsell suggestions, and generic responses expose chatbot failures. Machines are only as good as the operational discipline behind them. And this is where human AI literacy becomes critical. Staff need to understand what AI can and cannot do. They need to know how to prompt systems, supervise them, override them when necessary, and, more importantly, critically interpret AI outputs. The real risk is not that AI replaces humans, but that humans become passive operators of systems they no longer understand.

Revenue managers blindly trusting pricing tools, marketing teams over-automating guest communication, and front office staff unable to explain AI-driven offers. I recently worked on a project where a hotel sent 8 emails between the booking confirmation and arrival.

The pre-stay reality is simple: AI is already in control.

Discovery: Google, OTAs, and social platforms are increasingly AI-driven, meaning hotels no longer control visibility directly; they only influence it indirectly.

Consideration: AI chat assistants answer guest questions and summarize reviews, shaping perception before a human interaction ever happens.

Booking: Dynamic pricing engines and personalized offers influence purchasing decisions in real time.

Hotels are no longer simply selling rooms. They are competing inside AI systems that they do not control. And this changes everything. Hospitality leaders now require an entirely new skill set.

THE NEW SKILL SET FOR HOSPITALITY LEADERS

- **Data Awareness -** Understanding what data exists, where it comes from, and how it is used.
- **Systems Thinking -** Seeing the entire guest journey as an interconnected system rather than a collection of isolated silos.
- **Prompting & Interaction -** Knowing how to "talk" to AI systems effectively is becoming an extremely practical operational skill.
- **Critical Judgment -** Challenging AI outputs instead of blindly accepting them.
- **Operational Discipline -** Ensuring processes generate clean, structured, and usable data.

We need to start thinking differently. Understanding data is becoming foundational. One of my favorite phrases is: "data does not care about your feelings." But hospitality has historically been built around instinct and gut feeling. That mindset increasingly needs to evolve. Silos that have existed for decades between departments can no longer survive in an AI-driven environment. And the one thing hospitality professionals consistently say they lack is not technology, but time.

And this is precisely where AI should help.

At the same time, trusting AI 100% is dangerous. There will always need to be a human in the loop.

My biggest focus right now is mindset. Technology and AI are ultimately just tools. What matters is how hospitality leaders think about those tools. For too long, the industry has been obsessed with finding solutions before fully understanding the underlying problems. One of the most important shifts is learning to "fall in love with the problem, not the solution."

Traditional Mindset	AI-Literate Mindset
Technology supports operations	Technology shapes decisions
Tool-focused	System-focused
Reactive	Experimental
Delegates to IT	Owns cross-functional impact

AI LITERACY IS NOT A TECHNICAL SKILL. IT IS A LEADERSHIP CAPABILITY.

This is why AI literacy should not be treated as a narrow technical competency delegated to IT or digital specialists. In hospitality, it is fundamentally a leadership issue.

Hospitality leaders shape how technology is interpreted inside the organization. If leadership sees AI merely as a cost reduction tool, the conversation quickly narrows to automation, headcount pressure, and short-term efficiency. If leadership understands AI as a new layer of decision making, communication, and guest influence, then the conversation becomes strategic.

At the same time, AI is evolving so quickly that it is genuinely difficult for people to keep up. Combined with the daily operational pressures of running a hotel, it is understandable why many organizations adopt AI in a fragmented, unstructured way, simply experimenting to see what sticks. Leaders today need frameworks, governance, and shared accountability across departments for quality, risk, and purpose.

This reminds me of Phil LeBrun's story: a chicken and a pig decide to open a restaurant together. "Great idea," says the pig. "What should we serve?" "Bacon and eggs," replies the chicken. The point, of course, is that the pig carries a very different level of responsibility. Not all involvement is equal.

Without shared ownership, adoption becomes inconsistent. One department may use AI creatively and effectively while another avoids it entirely. One manager may understand the limitations of generative AI while another assumes that anything produced by a machine must automatically be efficient and correct. The result is fragmented adoption and uneven outcomes.

The hotels that will succeed in the future are the ones that get the mindset right.

First, data will be treated as a strategic asset rather than leftover operational exhaust. These hotels will understand that poor data hygiene creates downstream problems, and they will implement frameworks and processes to address it.

Second, they will invest heavily in onboarding and training. And this may actually become one of the industry's biggest challenges. Many hotels already struggle with onboarding staff into relatively simple operational roles. AI requires a much deeper shift: not only understanding where to click, but also learning how to refine, supervise, and challenge AI systems effectively.

Third, human checkpoints will become essential. AI outputs will need to be reviewed, refined, and controlled. Not everything should be left entirely to automation.

Fourth, departmental silos will need to disappear. No single department owns the pre-stay funnel anymore. Marketing, revenue, e-commerce, sales, and operations are now deeply interconnected.

Finally, success itself will need to be measured differently. The objective will not be maximising automation for its own sake, but using AI where it improves relevance, clarity, speed, and confidence without eroding the humanity of the brand.

THE NEXT CHAPTER OF HOSPITALITY LITERACY

Hospitality has always been described as a people business: understanding people, reading situations, anticipating needs before guests themselves articulate them. None of this disappears. If anything, it becomes even more valuable as systems and processes become increasingly automated. But leaders also need to understand how AI "reads" their business. This requires better data, clearer thinking, stronger judgment, and far more intentional leadership.

AI and data can no longer be viewed simply as tools. They must be treated as part of the business strategy itself. The real shift is not technological, but cultural. And the biggest challenge remains the human element.

People will naturally worry about their jobs when automation enters the workplace. They may question their value when machines begin handling tasks previously done by humans. But AI is not meant to replace people. At its best, it should remove repetitive tasks, reduce operational friction, and give people back the one thing hospitality professionals never seem to have enough of: time. For that to happen, however, people need to embrace change, step outside routine behaviors, and challenge many of the long-standing assumptions this industry has operated under for decades.

The most successful hotels will not be the ones with the most AI, but the ones that teach machines best. Speed alone will not win. Accuracy, clarity, discipline, and genuine human understanding will.

HYB

Choice Architecture in the Age of Algorithms

Pre-Stay

Giuseppe F. Italiano
Deputy Rector of AI, Luiss University

LUISS
Research Center
AI4Society

Giuseppe Italiano examines the pre-stay journey through the lens of behavioral economics and philosophy, arguing that algorithms have become the primary architects of traveler choice — nudging, filtering, and framing decisions in ways most guests never consciously register. The danger, he contends, is not that machines are making choices for us, but that we are gradually losing the discernment to notice, or care.

INTRODUCTION

The hospitality industry is currently navigating an unprecedented shift, moving from a traditional model toward a hybrid socio-technical ecosystem where the distinction between physical and digital is no longer a functional reality. Within this “fil rouge” of the traveler’s journey, the pre-stay phase, historically a domain of active searching, comparative analysis, and deliberate planning, has been fundamentally re-engineered by the rise of “choice architecture” driven by sophisticated algorithmic systems.

This transformation is not merely technological but philosophical, challenging our conventional understandings of human agency, the nature of desire, and the very concept of luxury. As the industry approaches the midpoint of this “everything-data decade,” the role of the hotelier is evolving from a provider of physical accommodation to a co-curator of cognitive experiences, where the invisible hands of machine learning can shape the guest’s path long before they step foot into a lobby.

To understand the contemporary pre-stay journey, one must first consider that we are currently blurring the boundaries between human and artificial, between human intent and machine recommendations. Indeed, in the pre-stay context, we are witnessing a transition from “active search” to more “curated content flows”. Historically, travelers engaged in a slow, deliberative evaluation of options using guidebook materials and early web-based search engines. Today, however, we are witnessing the rise of “algorithmic governmentality”, a state in which algorithms influence, shape, and guide behavior through a subtle framing of choices. The shift toward algorithmic curation is perhaps best exemplified by the “feedback loops” of social media platforms like TikTok, where the system constantly negotiates with the user’s immediate emotional state and cultural capital to deliver highly resonant travel content.

THE MECHANICS OF CHOICE ARCHITECTURE

The theoretical foundation of this algorithmic influence lies in behavioral economics, specifically the concept of “choice architecture” and “nudge theory” popularized by Thaler and Sunstein. A choice architect is someone who frames the presentation of options to influence decision-making without explicitly forbidding any alternatives or significantly changing economic incentives. In the digital pre-stay environment, algorithms serve as the primary choice architect, utilizing six fundamental tools to steer travelers toward specific outcomes.

The first of these tools is the management of defaults. Because human beings are naturally prone to inertia, they are disproportionately likely to accept a pre-selected option. In hotel booking engines, this often manifests as the auto-selection of a “flexible” rate or the inclusion of travel insurance.

The second tool, expecting errors, involves designing interfaces that anticipate user mistakes, such as dates being entered in the wrong format or the accidental selection of duplicate rooms, and gently correcting them before the traveler reaches the payment stage.

Feedback represents the third tool, linking actions to outcomes in real-time. When a platform displays a message stating that "5 other people are looking at this room right now," it provides social feedback that heightens the perceived value and urgency of the choice. The fourth tool, understanding mappings, helps travelers translate complex technical data into meaningful life outcomes. For example, instead of listing the carbon footprint of a flight in kilograms, a platform might nudge a user toward a more sustainable option by mapping that data to the number of trees required to offset the journey.

Structuring complex choices and incentivizing represent the final two tools. As the number of choices increases, travelers suffer from cognitive overload and decision fatigue, leading them to rely on mental shortcuts or heuristics. Algorithmic systems mitigate this by filtering thousands of possible hotel properties into a “top three” list tailored specifically to the user's past behaviors and inferred preferences. Incentives are then used to reinforce these curated choices, often through loyalty points or dynamic pricing that rewards early booking.

THE PROMETHEAN SHAME

A critical philosophical dimension of this shift is what Günther Anders termed “Promethean Shame”, i.e., the sense of inferiority humans feel when confronted by the superior performance of their own technological inventions. In the travel industry, hoteliers and travelers alike are realizing that AI can process petabytes of travel data to generate a perfect itinerary in seconds, a task that would take a human being weeks of research.

This shame often leads to a defensive resistance, particularly among senior industry professionals who may view such technological reliance as “unnatural”. Rather than viewing AI as a replacement for human agency, we should see it as an augmentation of our capabilities, allowing us to navigate a world of infinite choice without succumbing to the paralysis of indecision.

AGENTIC AI AND THE END OF THE BOOKING FUNNEL

As we step into the future, the traditional linear booking funnel, i.e., awareness, consideration, intent, and purchase, seems to have reached its own limits. In its place, we will find more “Agentic AI,” a new generation of autonomous digital entities that do not just suggest options but take action on behalf of the traveler.

Agentic AI represents an “invisible concierge” that lives within the user’s mobile device, capable of booking a boutique hotel, making restaurant reservations, and adjusting itineraries in real-time as disruptions may occur.

This shift toward agency fundamentally changes the pre-stay journey from a series of disjointed clicks to a continuous, conversational flow. Major players, like Expedia and Airbnb, are already integrating agentic capabilities into their platforms, focusing on “knowing” the user rather than just searching for them. For hoteliers, this means that the customer is no longer always a human; it is often an AI agent acting as an intermediary.

The economic implications are profound. Best-in-class hotels that utilize agentic guest communication and AI-search citation tracking are seeing lift in direct bookings and a significant reduction in the cost-per-acquisition. This is driven by the ability of AI to sequence pre-arrival communications based on granular data such as length of stay, room type, and historical preferences, creating a sense of personalization that legacy CRM systems could never achieve.

THE IRON CAGE OF METRICS

While the efficiency gains of algorithmic choice architecture are undeniable, there is another side of the coin, namely “algorithmic involution”. This phenomenon occurs when platforms prioritize statistical rationality, i.e., metrics like click-through rates (CTR) and Gross Merchandise Volume (GMV), over value rationality, which includes justice, ethics, and human welfare. Driven by the imperative of profit maximization, platforms can trap the hospitality ecosystem into an “iron cage” where ethical considerations are suffocated by the relentless pursuit of short-term indicators.

One of the most concerning manifestations of this is the “black box” nature of algorithmic decision-making. Unlike traditional market misconduct, which is visible and regulated, algorithmic violations, such as price discrimination or the coercive allocation of traffic, are concealed within complex code and dynamic data flows. This opacity creates a “governance void” where travelers may be nudged toward choices that are in the platform’s best interest rather than their own, such as hotels with higher commission rates or “urgency” cues that are essentially artificially manufactured.

Furthermore, the over-reliance on algorithms risks making travelers “dumber” by reducing their discernment and causing them to lazily defer to machine suggestions. When we navigate a city or choose a hotel based solely on a GPS or a recommendation engine, we lose the ability to make conscious judgments or understand the underlying structures of the environment. This erosion of critical thinking is a central concern for the hospitality industry, as it threatens the authenticity of the travel experience itself.

THE ROLE OF DATA IN SUSTAINABLE SUCCESS

At the core of this transformation is data. The "everything-data decade" is reshaping how hotels understand traveler intent and behavior. Predictive analytics can now detect patterns in guest preferences, such as a desire for wellness-focused sleep optimization or a preference for local, farm-to-table dining, before the guest has even voiced those needs. However, the pursuit of data must be balanced with legal compliance and responsibility. As AI takes on a larger role in how we make decisions, transparency and fairness are non-negotiable.

Hoteliers must ensure that guest data is managed in private, secure environments and used only to enhance the guest experience, rather than to feed public AI models or engage in predatory pricing.

CONCLUSION: THE INVISIBLE ARCHITECT AS A PARTNER

The pre-stay phase of the traveler’s journey is no longer a solitary act of planning; it is a collaborative dance between the traveler and the “invisible architect” represented by algorithms. Choice architecture, when used responsibly, has the power to simplify the complex, encourage sustainable behavior, and guide travelers toward more satisfying and meaningful experiences.

Yet, as we embrace a future where technology makes us more “human” than ever before, we must remain vigilant against the erosion of our own discernment. The goal of the modern hotelier is to design an environment that leverages the efficiency of machines while celebrating the unique, irreplaceable value of the human touch. By understanding the psychological and philosophical foundations of algorithmic influence, the hospitality industry can move beyond the “iron cage” of metrics and into a new era of authentic, hybrid hospitality, where every choice is facilitated by machines, but every connection is powered by humans.

HYB

From Search to Synthesis: Visibility in an Answer-Based Internet

Pre-Stay

Alessio Re
Co-founder, Elegia

Elegia

The pre-stay booking funnel has fundamentally shifted, and most hotel tech stacks are nowhere near ready for it. Alessio Re maps the three-layer challenge hotels now face - getting cited by AI systems, owning accurate and structured data, and having a vendor stack capable of converting agent-driven discovery into actual bookings - and argues that treating this as an SEO problem with new vocabulary will not get the industry far enough, fast enough.

The funnel for finding and booking a hotel has split across two surfaces, and most hotel tech stacks are not ready for either. In March 2026, Walmart's EVP for design and product, Daniel Danker, told WIRED that purchases inside ChatGPT through OpenAI's Instant Checkout had converted at one-third the rate of click-outs to Walmart.com on the same catalogue (Dave 2026). Walmart ran 200,000 SKUs through Instant Checkout from November until OpenAI pulled it back, pivoting to merchant-controlled apps inside ChatGPT, the architecture Walmart's Sparky and Accor's ALL app already use. Hotels are not selling USB cables. They sell rate-and-availability bundles that change hourly, with cancellation policies, loyalty tiers, package inclusions and city fees that a chatbot flattens or gets wrong. If a 200,000 SKU retailer failed at in-chat conversion, hotels with messy data and a locked vendor stack will fail worse.

Pre-stay visibility in 2026 rests on three things:

- Content architecture that earns a citation in an AI answer
- A data layer that lets a hotel describe itself accurately to a model
- A vendor stack that lets an agent act on what it finds

Too many hotels still treat this as an SEO problem with new vocabulary, which solves only a fraction of the first item and none of the other two. A property that does all three has a chance of getting cited by the models that matter and converting that interest into a direct booking.

THE CITATION LAYER HAS DECOUPLED FROM THE RANKING LAYER.

January 2026's upgrade of AI Overviews to Gemini 3 changed how citations get selected. Ahrefs measured the share of AI Overview citations that also ranked in the top 10 organic results, dropping from 76% in July 2025 to 38% in February 2026, across 863,000 keywords and 4 million URLs; BrightEdge put the overlap closer to 17% (Southern 2026). The numbers diverge, but they point in the same direction: ranking well is no longer a proxy for being cited.

The main mechanism is called query fan-out. Gemini, the AI system, breaks the user's request into smaller questions called sub-queries. It then retrieves information for each part and cites the web pages that consistently answer these sub-questions, not just the page ranked first for the original query. This means Overviews are built using sources that cover specific parts of the question, such as a TripAdvisor thread or a YouTube creator's video.

The citation pool itself is not where most hotels expect to find themselves. The 5W AI Platform Citation Source Index synthesized 680 million citations across ChatGPT, AI Overviews, Perplexity, Gemini, and Claude (5W 2026): Reddit accounts for 40% of LLM citations, YouTube is the most-cited domain in Google's AI surfaces, and the top 15 domains capture 68% of the pipeline.

A hotel can earn a citation directly by publishing accurate, dated content answering a granular question: pet policy with the fee and breed restriction, parking with the height clearance, late check-in with the cut-off, and contact method. A page in plain FAQ format with structured data markup reads the same way to a human and to a language model.

Google's May 2026 AI Overviews redesign added five citation surfaces, including hover previews, a subscribed-publisher label, and a Community Perspectives panel quoting Reddit and forum posts with creator handles attached (Budaraju 2026). The shape of what gets cited shifts month to month; anything in this section is calibrated to mid-2026.

DATA OWNERSHIP IS THE PILLAR MOST HOTELS SKIP.

A model can only cite what it reads accurately. A hotel can only be read accurately if it owns the canonical version of its information. For most hotels, that version does not exist. Pricing lives in the revenue management system. Availability is in the channel manager. Descriptions appear in the booking engine or PMS. Policies are in a Word document. Loyalty terms reside on a white-label third-party platform. None of those systems talks to each other with full fidelity. The OTA listing is often cited because it is structured and updated against a known schema.

The 2026 HotelRank study audited 121,000 hotel homepages across seven countries and found 36% with no structured data, and 10% with what it classified as good Hotel or LodgingBusiness schema (HotelRank 2026). The fix is rarely a technology problem; it is a question of who owns and updates the data. Independent hotels and smaller groups need a warehouse-first architecture in which the PMS, booking engine, email service provider, and consent records flow into a layer they control. Marriott earmarked $1.1 billion for 2026, with 35 to 40% going towards replatforming its property management, reservations, and loyalty systems, while the CEO described the company as "pulling into the players' parking lot" on agentic AI (Marriott International 2026). Smaller operators will never spend that, but the architecture is achievable on a smaller budget.

European regulation is moving in two directions, and neither addresses the underlying problem. On 16 April 2026 the Commission's preliminary findings against Google, part of a specification proceeding opened on 27 January, proposed Google share ranking, query, click and view data with third parties on fair, reasonable and non-discriminatory (FRAND) terms, with AI chatbots that have search functionality named "data beneficiaries"; a binding decision is due by 27 July 2026 (European Commission 2026). The intent is to open AI search, but forcing those signals to flow to more third parties widens the privacy surface, which the proceeding does not address.

The AI Act's Article 50 transparency obligations, from 2 August 2026, require hotels to disclose AI-generated content and machine-mark synthetic imagery. Both regulations assume the hotel knows what its data is, where it lives, and who has it.

THE VENDOR STACK DETERMINES WHETHER VISIBILITY CONVERTS.

Discovery is one half of the pre-stay funnel. The other half is conversion: whether an agent who has identified the right hotel can complete the booking without the flow falling over. This is where most hotels lose the agent traffic they've earned, because the vendor stack governs whether the booking completes.

Two early-stage technical standards saw progress in February 2026. WebMCP (a protocol that allows websites to communicate structured actions, such as searching for availability or applying rates, to AI agents, developed by Google and Microsoft) launched as a preview in Chrome 146 on 10 February. Rather than forcing AI to read website screens as humans do, WebMCP tells the agent exactly what functions are available (Bokan et al. 2026).

Cloudflare's Markdown for Agents, released two days later, provides simplified versions of webpages specifically designed for AI to read, reducing the work for AI agents by around 80% (Martinho and Allen 2026). MCP, a separate server-side protocol, connects AI assistants directly to hotel backend systems. Each vendor should prepare to adopt these protocols.

The first significant hospitality move on this architecture is Accor's. The group launched ALL inside ChatGPT on 29 January 2026, in over twenty languages, across brands from Sofitel to ibis. The user searches and configures in chat, sees rates and amenities, then, upon booking, is redirected to the ALL platform to complete the reservation on Accor's surface (Accor 2026). The handoff matters because Walmart's in-chat conversion collapsed: the chat window strips out brand context, reviews, bundle logic, upsell, and the cancellation policy travelers rely on at commitment. Chat is fine for discovery, but the actual conversion needs to land somewhere the merchant controls, and most merchants in our field have not built that yet.

Most hotels do not own their checkout flow. It sits inside a white-label booking engine widget, governed by that vendor's release cadence. The same vendor lock-in that forces hotels to route pricing through third-party feeds to metasearch and OTAs now determines whether they appear in agentic commerce. The chokepoint that prevented Book on Google from working will determine whether a hotel can support WebMCP, expose a merchant app in ChatGPT or Gemini, and route agent discovery back to a direct booking. Three questions for every PMS, CRS, channel manager, and booking engine vendor this year:

- What is your roadmap for MCP and WebMCP, and how quickly do you ship support when OpenAI, Google, or Anthropic publishes the next protocol update?
- Can your booking process be tagged so an AI agent can access it directly?
- Do I own my data, with the right to export it cleanly and without high export fees?

Vague answers mean the vendor will be the bottleneck on everything upstream.

THE NEXT TWELVE MONTHS

A few guesses for the next twelve months. I expect to be wrong about at least one.

WebMCP will likely shift from preview to general availability in Chrome and Edge by late 2026. Some booking engine vendors will support it, but most won't. Supportive vendors will become more attractive to attentive hotels.

More major chains will launch ChatGPT apps on the Accor template, and at least one large OTA will do the same. Independents and smaller groups will sit this out: their vendor stacks will not let them in.

The citation pool will continue to move away from the top 10 organic results. Hotels that publish dated, granular content on their own pages should catch some of that traffic. The ones still relying on their OTA listings as the canonical version will lose ground in places they cannot easily see.

Vendors in our field have long been slow and conservative; last year highlighted this further. This likely won't change soon, though I hope I am wrong.

REFERENCES

Accor (2026), "Accor leads hospitality innovation with the launch of its ALL Accor app in ChatGPT", press release, available at: https://press.accor.com/accor-leads-hospitality-innovation-with-the-launch-of-its-all-accor-app-in-chatgpt/?lang=eng (accessed 18 May 2026).

Bokan, D., Sagar, K., Van Opstal, H., Walderman, B., Lee, L., and Nolan, A. (2026), "WebMCP is available for early preview", Chrome for Developers Blog, available at: https://developer.chrome.com/blog/webmcp-epp (accessed 18 May 2026).

Budaraju, H. (2026), "5 new ways to explore the web with generative AI in Search", Google Blog, available at: https://blog.google/products-and-platforms/products/search/explore-web-generative-ai-search/ (accessed 18 May 2026).

Dave, P. (2026), "Why Walmart and OpenAI Are Shaking Up Their Agentic Shopping Deal", WIRED, available at: https://www.wired.com/story/ai-lab-walmart-openai-shaking-up-agentic-shopping-deal/ (accessed 18 May 2026).

European Commission (2026), "Commission proposes measures to Google on sharing search engine data with third parties under Digital Markets Act", press release IP/26/825, available at: https://ec.europa.eu/commission/presscorner/detail/en/ip_26_825 (accessed 18 May 2026).

HotelRank (2026), "Hotel Schema.org Adoption Study 2026", available at: https://hotelrank.ai/research/hotel-schema-adoption-study-2026 (accessed 18 May 2026).

Marriott International (2026), "Fourth Quarter 2025 Earnings Conference Call Transcript", available at: https://marriott.gcs-web.com/static-files/30de714f-753d-4ee1-8ea8-d55cf9d7424a (accessed 18 May 2026).

Martinho, C. and Allen, W. (2026), "Introducing Markdown for Agents: making the web a first-class destination for AI", Cloudflare Blog, available at: https://blog.cloudflare.com/markdown-for-agents/ (accessed 18 May 2026).

Southern, M.G. (2026), "Google AI Overview citations from top-ranking pages drop sharply", Search Engine Journal, available at: https://www.searchenginejournal.com/google-ai-overview-citations-from-top-ranking-pages-drop-sharply/568637/ (accessed 18 May 2026).

5W (2026), "AI Platform Citation Source Index 2026", available at: https://everything-pr.com/ai-platform-citation-source-index-2026/ (accessed 18 May 2026).

HYB

The Death of Blue Links: Hospitality Marketing After Search

Pre-Stay

Antonio Picozzi
CEO & Founder, dAirect

dAirect

Antonio Picozzi argues that the thirty-year paradigm of search-driven hospitality marketing is collapsing and that generative AI is replacing the logic of discoverability with an entirely different logic: one where being understood matters more than being ranked, and where a hotel's digital identity is only as strong as its least consistent data source.

For almost thirty years, the architecture of the web remained philosophically stable. We searched, clicked, compared, evaluated, and eventually acted. The internet functioned as a gigantic system of aggregation, where search engines organized fragmented information through keywords, hyperlinks, and rankings. Visibility was fundamentally tied to discoverability within a list of blue links.

That paradigm is collapsing.

What is happening today is not simply another algorithm update or the emergence of a new acquisition channel. We are witnessing a structural mutation in how humans interact with digital information. Search is becoming conversational. Interfaces are becoming agentic. The web is shifting from aggregative to generative.

And hospitality, perhaps more than any other industry, will feel the impact immediately.

The reason is simple: travel has always been one of the most fragmented ecosystems on the internet. A hotel does not exist in one place. It exists simultaneously across OTAs, metasearch engines, Google Business profiles, wholesalers, review platforms, blogs, forums, maps, directories, social media platforms, reseller inventories, old PDFs, and forgotten listings created years ago by someone who no longer works for the company.

For decades, search engines served as navigational systems, helping users navigate this fragmentation. AI changes the equation entirely. Instead of navigating fragmentation, generative systems attempt to synthesize it.

And this changes everything.

FROM SEARCH ENGINES TO ANSWER ENGINES

Traditional search engines retrieve documents. Generative AI retrieves meaning.

This distinction may seem semantic, but it radically transforms online competitive positioning.

In a classical SEO environment, a user searching for “best luxury hotel in Rome” would receive a ranked list of links. The user would then click multiple websites, compare prices, read reviews, open maps, verify locations, evaluate images, and eventually make a decision after dozens, sometimes hundreds, of micro-interactions.

This process was cumbersome, but also measurable. Visibility depended on rankings. Traffic depended on clicks. Success depended on optimization for discoverability.

Generative systems operate differently.

When a user asks ChatGPT, Gemini, Claude, or Perplexity for “a quiet luxury hotel in Rome with excellent vegetarian options and walking distance from major landmarks,” the system does not simply retrieve indexed pages. It probabilistically synthesizes information across multiple sources to infer intent, emotional context, constraints, and likely expectations.

The interaction becomes less query-driven and more intention-driven.

The consequence is profound: users increasingly receive structured answers without ever visiting the original source.

We are entering the era of zero-click hospitality.

THE COLLAPSE OF THE FUNNEL

Hospitality marketing has spent the last two decades obsessing over funnels.

Awareness. Consideration. Comparison. Conversion.

Every platform, campaign, attribution model, and dashboard was built on the assumption that users progressed through measurable stages. Even metasearch engines emerged as a solution to the inefficiency of fragmented comparison.

AI compresses this entire structure.

A conversational system can now reduce what previously required hundreds of touchpoints into a single interaction.

The user no longer searches ten websites. The AI does it for them.

The user no longer manually compares 20 rates. The AI synthesizes the options.

The user no longer needs to interpret fragmented reviews. The AI summarizes sentiment probabilistically.

This creates an uncomfortable reality for hospitality brands: traffic may decline while interest increases.

Many hotels are already observing drops in direct website sessions. In many cases, this is not a sign of declining demand. It is a sign that users can now interact with brand information without generating measurable clicks.

The conversation happens elsewhere.

VISIBILITY IS NO LONGER ENOUGH

In the traditional web, visibility meant rankings.

In generative ecosystems, visibility becomes mentionability.

The difference matters enormously.

Historically, digital marketing focused heavily on backlinks. The value of an article, a press mention, or a partnership was often measured through its ability to transfer authority via hyperlinks. But generative systems do not necessarily care about hyperlinks in the same way humans or traditional search engines do.

An article mentioning a hotel in a trusted publication may now hold enormous value even without linking directly to the official website, because the AI may still extract that mention as a trusted source.

This completely changes how we think about authority.

Being referenced becomes more important than being clicked.

Being cited becomes more important than being ranked.

Being coherent becomes more important than being optimized for isolated keywords.

The strategic implication is brutal: if your brand is not included in the AI-generated conversation, you effectively disappear.

There is no second page anymore.

THE TRIBUNAL OF CONSISTENCY

One of the most dangerous misconceptions about AI visibility is the assumption that the official website remains the single dominant source of truth.

It does not.

Generative systems synthesize information across ecosystems. And hospitality ecosystems are notoriously inconsistent.

An outdated reseller description from 2009, an incorrect wholesaler contract, a forgotten directory listing, contradictory room counts across platforms, inconsistent amenity descriptions, inaccurate policies, or poorly maintained Google Business profiles can all contribute to the AI's understanding of the property.

This creates what could be described as a "tribunal of consistency."

AI systems constantly cross-reference information to establish probabilistic confidence. If the ecosystem surrounding a hotel contains contradictions, ambiguity, or fragmented narratives, the model may either generate uncertain answers or rely on incorrect assumptions.

This is not theoretical.

A simple question like "How many rooms does this hotel have?" can already generate conflicting answers depending on the sources being analyzed.

In a ranking-based world, inaccurate information hidden on page ten of Google had a limited practical impact.

In a generative environment, that same information can suddenly become central if it satisfies the user's query context.

This means that reputation management evolves into ecosystem management.

Every mention matters.

Every inconsistency matters.

Every neglected platform matters.

REDDIT, FORUMS, AND THE RISE OF CONVERSATIONAL SOURCES

One of the most fascinating consequences of generative search is the resurrection of previously underestimated platforms.

For years, many hospitality brands focused almost exclusively on brand.com, official channels, OTAs, and major review websites. Forums and conversational communities were often considered secondary or irrelevant.

AI changes this dynamic.

Platforms like Reddit have become extraordinarily valuable because they already mirror the structure of conversational search itself: questions followed by contextual answers.

This makes them highly compatible with probabilistic language models.

A traveler asking, "What is the best family-friendly hotel in Paris for a vegan couple traveling with a dog and children?" resembles the structure of a Reddit thread far more than the structure of a traditional keyword search.

Consequently, niche conversations that previously remained buried deep within the internet have now become highly extractable sources for AI-generated answers.

And this creates a paradox.

A hotel may discover that its visibility inside AI systems depends less on its homepage and more on how people discuss it across fragmented digital conversations.

The web is becoming less document-centric and more narrative-centric.

SEO IS NOT DEAD. IT IS BECOMING SEMANTIC INFRASTRUCTURE

There is a temptation to declare the death of SEO every time a technological transition occurs.

That interpretation is simplistic.

What is changing is not the need for optimization, but the object being optimized.

Traditional SEO largely focused on discoverability through rankings and keywords.

Generative optimization focuses on semantic clarity, consistency, contextual depth, and machine interpretability.

This includes structured data, Schema.org implementation, JSON-LD architecture, contextual FAQs, semantic chunking, content modularity, and increasingly headless environments that dynamically adapt information based on whether the recipient is human or machine.

But technical optimization alone is insufficient.

The deeper shift is conceptual.

Brands must stop thinking about websites as static brochures and start understanding them as living semantic infrastructures designed to communicate simultaneously with humans and artificial agents.

In practice, this means websites increasingly require multiple communication layers operating at the same time:

An emotional layer for humans.

An analytical layer for pragmatic evaluation.

An interrogative layer anticipating conversational intent.

And a machine-readable layer designed for AI systems.

This is no longer simply web design.

It is interface diplomacy between biological and synthetic cognition.

THE EMERGENCE OF THE AGENTIC WEB

What we are currently witnessing is only the beginning.

Today, generative AI still primarily serves as an intermediary layer, helping users retrieve information.

Tomorrow, it will increasingly become an active participant capable of performing actions autonomously.

The implications for hospitality are enormous.

Users will not merely ask for recommendations. Their AI agents will negotiate, compare, verify, communicate, and eventually transact on their behalf.

This is the transition from search engines to agents.

And in such an environment, static websites become insufficient.

If an AI assistant is attempting to book a room, retrieve cancellation policies, compare package structures, verify dietary constraints, and complete a payment flow, it cannot rely on fragmented static pages designed purely for human visual navigation.

Hospitality websites themselves will need to become agentic.

The future official website may no longer primarily serve as a visual destination for human users, but as the official interface through which external AI agents communicate directly with the hotel's own AI infrastructure.

This transforms the website into something radically different: not a digital brochure, but an operational intelligence layer.

In this future, the true competitive advantage may no longer be SEO rankings, but the existence of a reliable, authoritative "Single Source of Truth" that can interact fluidly with external agents.

THE REAL STRATEGIC CHALLENGE

The hospitality industry often reacts to technological transitions by searching for tactical shortcuts.

But this transition is not tactical.

It is epistemological.

Competitive positioning in a queryless environment is not about gaming keywords. It is about constructing coherent, machine-readable identity systems that can withstand probabilistic interpretation.

Brands that continue treating AI as merely another acquisition channel risk misunderstanding the scale of the transformation.

This is not another platform.

This is a new cognitive layer sitting atop the web itself.

And the hospitality brands that succeed will not necessarily be the ones with the biggest advertising budgets, the most aggressive SEO strategies, or the largest distribution footprint.

They will be the ones capable of becoming semantically coherent, structurally authoritative, contextually relevant, and conversationally extractable.

Because in a post-search landscape, discoverability no longer depends on being found.

It depends on being understood.

HYB

The Invisible Shortlist

Pre-Stay

Kurt Weinsheimer
President and GM Properties, Sojern

SOJERN

Kurt Weinsheimer draws on 25 years in online travel to argue that the shift to AI-powered discovery is categorically different from every platform change that came before it. When a search returns five options instead of fifty, being sixth is the same as being invisible — and most hotels have no idea how they appear, or whether they appear at all, on the shortlists AI systems are already building.

HOW AI DECIDES WHICH HOTELS GET CONSIDERED BEFORE SEARCH BEGINS

Twenty-five years in online travel teaches you to spot a platform shift early. I've watched hotels scramble to master SEO, then metasearch, then OTA ranking, then paid social. Each time, the underlying game was the same: get seen. What's happening now is something different. The question hoteliers are losing sleep over isn't "how do we rank?" It's "how do we even make the list?"

Not long ago, a guest planning a trip would open a browser, search, scroll through a dozen tabs, and eventually land on a page where they could book. That journey still exists, but a growing share of travelers are skipping it entirely. They're typing a question into ChatGPT or Perplexity and getting back five options. Not fifty. Five. And those five feel like a recommendation rather than a list. The contest for hotel bookings is being decided earlier than ever, and in a layer most hoteliers haven't yet learned to compete in.

That shift is real, and it's impacting hoteliers today. According to BCG, about 37% of travelers already use AI-enabled sites to plan and book trips. McKinsey found that 84% of those who have used generative AI for travel report that it improved their experience, and that AI-referred visitors show a 45% lower bounce rate when they do reach a travel site. These aren't early-adopter numbers anymore; they're fundamentally changing how hotels get discovered.

FROM SEARCH ENGINE TO SHORTLIST ENGINE

Traditional search was generous with options. A Google query might return fifty results, and a guest would navigate, read, compare, and decide at their own pace. AI-powered search is the opposite of generous. As Accor's AI and data science chief put it recently: *"With Google, a search gives you 50 results; if you ask ChatGPT, it gives you five, and that is it."*

This compression changes everything about the economics of discovery. When fifty listings compete, a strong OTA ranking or a well-optimized metasearch feed is enough to stay in the game. When the shortlist is five properties, being sixth is the same as being invisible. As the funnel condenses, the margin for error collapses.

What makes the change even more significant is how AI assembles that shortlist. Traditional search engines indexed pages and ranked them by relevance and authority signals, a system that, for all its complexity, hotels had learned to work with. AI systems do something fundamentally different: they interpret intent. A traveler doesn't have to type *"boutique hotel Rome city center."* They can say *"a quiet place to stay in Rome that doesn't feel like a business hotel,"* and the LLM has to figure out what that means, match it to properties whose attributes satisfy the description, and return options it can confidently stand behind.

That confidence is built from data. And most hotels have less usable data than they think. The new shelf space isn't a search ranking or an OTA placement. It's whether AI can read a property clearly enough to recommend it.

WHAT THE MACHINE IS ACTUALLY READING

There are three layers to how AI systems evaluate and surface a hotel. Understanding them is the first step to competing for the invisible shortlist.

The first is data quality and consistency. Rate parity, accurate amenity information, real-time availability, and consistent policies are no longer just commercial hygiene; they're inputs into ranking systems. An AI agent that identifies pricing inconsistencies or availability that don't match what's bookable will deprioritize the property or remove it from consideration entirely. Transparency has shifted from a brand value to an operational requirement. It's no longer enough to intend to be accurate; the data has to be accurate at the point of retrieval, every time.

The second layer is semantic richness. This is where most hotels currently fall short. AI systems don't read a hotel the way a human reads a website. They parse structured signals and extract meaning from descriptions written for humans. A property that describes itself as *"a premier urban retreat with unparalleled service"* gives an AI very little to work with. A property that describes a west-facing terrace, a menu built around local producers, and a preference for guests who want a slower pace of city life gives the AI exactly what it needs to match against the specific, experience-led queries that now dominate AI travel searches. The shift to plain-speech search (*"a calm hotel with good light for working," "somewhere romantic without being stuffy"*) demands that properties describe themselves the way travelers actually think and talk.

The third layer is reputation as a trust signal. AI systems increasingly read review sentiment as a proxy for reliability. Properties with strong, consistent, and recent reviews surface more confidently than those with patchy or dated feedback. Responding to reviews promptly signals to AI models that a brand is active and accountable. This means that reputation management, long treated as a post-stay function, is now shaping the pre-stay pipeline. What a guest writes after checking out influences whether the next guest ever considers checking in.

We see this play out in data every day, in the billions of real-time intent signals that flow through the travel ecosystem, capturing what travelers are searching for, exploring, and comparing before they ever declare booking intent. That signal layer is increasingly where competitive advantage lives. The properties that understand their own data and make it readable by both humans and machines are the ones that appear where decisions are being made.

THE TRUST PROBLEM, AND WHY IT'S ALSO A PHILOSOPHY PROBLEM

Hospitality people talk about trust in human terms: the front desk agent who remembers my name as a guest, a problem in my room fixed before it's mentioned twice. That kind of trust is built slowly, stay by stay. AI operates on a different currency entirely. It doesn't remember a great check-in.

What it reads is whether your rates are consistent, your amenity data is up to date, and your reviews are recent. Machine trust, in other words, is just data integrity at scale. The interesting thing is how closely that mirrors what the best hotels have always done anyway.

A hotel that is honest about what it is (accurate about price, clear about what's included, transparent about its policies, and consistent in how it describes itself across every channel) builds machine trust automatically. A hotel that overpromises, carries outdated information in its listings, or lists amenities that were removed two years ago fails the machine test for the same reason it eventually fails the human test: it's not telling the truth clearly enough.

That's clarifying rather than threatening. The properties that struggle in AI-mediated discovery are often the same ones that have always struggled to convert, because inconsistency erodes confidence, whether the decision-maker is a traveler or a language model. Getting your data right isn't a technical project. It's a commitment to being what you say you are.

A PRE-STAY CHECKLIST FOR THE AI ERA

So where do you begin? Here are five things worth doing now, roughly in order of priority.

- **Audit for GEO, not just SEO:** Ask ChatGPT, Perplexity, and Gemini about your property. Ask them the kinds of questions your guests actually ask, not just your hotel name. What comes back? What's missing, wrong, or represented by a competitor instead? The gap between what you think AI knows about you and what it actually surfaces is your starting point.
- **Invest in semantically rich content:** Describe your property the way a traveler would ask for it, not the way a marketing team would headline it. Think in experiences and attributes: the kind of light in the morning, the feel of the neighborhood, what kind of guest thrives there. AI needs to match you to a vague human desire. Give it the vocabulary to do that.
- **Treat data quality as infrastructure:** Rate parity, accurate amenity data, and real-time availability are no longer just commercial hygiene; they're ranking inputs. A focused audit of your feeds across OTAs, metasearch, and your own site is worth more than any single campaign optimization right now.
- **Build reputation as a pre-stay asset:** Respond to reviews consistently and promptly. Encourage guests to leave specific, attribute-rich feedback rather than generic scores. Use in-stay tools to catch issues before they become public. Reputation is no longer something you manage after the fact; it feeds the funnel before it starts.
- **Don't abandon paid marketing; understand where it fits.** Paid marketing remains important. Google's AI Mode still surfaces ads alongside generative answers, and existing paid investments carry over. But GEO and paid now need to work in parallel, not in silos. Think of paid as capturing demand once a traveler has moved to active search; GEO is about shaping the shortlist before they get there.

THE HOTELS THAT WIN UPSTREAM WILL OWN THE STAY

Every distribution shift I've lived through has asked something specific of hoteliers. Direct booking meant owning your channel. Metasearch meant getting serious about rate discipline. OTAs meant your photos and reviews had better be good. This one asks for something that sounds almost philosophical but is really just operational: be legible. To systems that don't care about your brand story, your awards, or your renovation. They just need to be able to read you clearly enough to recommend you.

The good news is that what AI values and what great hospitality is built on are one and the same: consistency, honesty, and a clear sense of what makes a property distinctly itself. The hotels that get this right first won't just win more bookings in the short term. They'll compound the advantage, because AI rewards signal quality over time, and trust, once established in a system's memory, is hard to displace.

Expedia's CMO recently said he expects the next conversation to be agent-to-agent; AI systems negotiating directly with other AI systems on a traveler's behalf. I think he's right, and I think it's closer than most hoteliers realize. The window to get your data in order (your content readable, your reputation current) is open now. It won't stay open indefinitely. The invisible shortlist is already being built. The only real question is whether your property is on it.

RESOURCES

AFP (2026), 'Hotels strive to be found as AI models conduct travel search', *Agence France-Presse*, 24 May. Available at: https://www.france24.com/en/live-news/20260524-hotels-strive-to-be-found-as-ai-models-conduct-travel-search (accessed 27 May 2026).

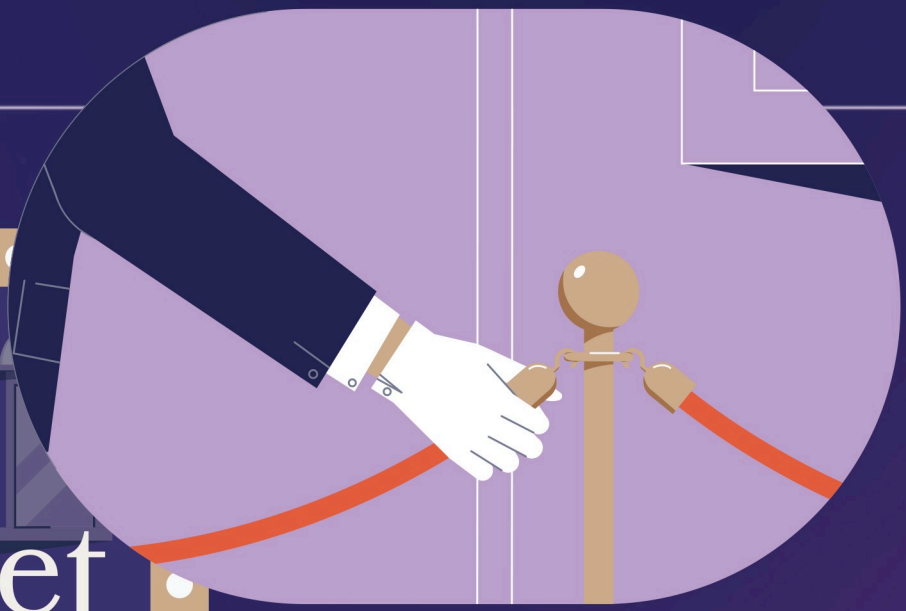
Mann, R., Bartman, T., Krishnan, V., Crohmal, D., Kessler, G., Stadler, K., Chang, K., and Smith, M. (2025), 'Travel industry trends and the opportunity for private equity', *McKinsey & Company*, 24 November. Available at: https://www.mckinsey.com/industries/private-capital/our-insights/travel-industry-trends-and-the-opportunity-for-private-equity (accessed 27 May 2026).

McKinsey & Company (2026), 'Travel planning gets an AI upgrade', *McKinsey & Company*, March. Available at: https://www.mckinsey.com/featured-insights/week-in-charts/travel-planning-gets-an-ai-upgrade (accessed 27 May 2026).

Lee, A. (2026), 'B2A? AI Agents Are Travel's New Audience — And They Don't Care About Brands, *Skift*, 22 May. Available at: https://skift.com/2026/05/22/b2a-ai-agents-are-travels-new-audience-and-they-dont-care-about-brands/ (accessed 27 May 2026).

SOJERN

AI has already built the shortlist.



...is **your hotel** on it?

Sojern helps hotels become visible where AI-driven travel decisions begin. By turning billions of real-time traveler intent signals into actionable marketing, guest experience, and reputation insights, we help properties earn a place on the shortlist before traditional search even begins.

See how at www.sojern.com.

HYB

The Distribution Layer in the AI-First Era

Pre-Stay

Max Starkov
Hospitality & travel technologist and digital strategist, Hospitality Net

HN

Max Starkov argues that the rise of AI platforms as travel discovery tools is reshaping hotel distribution faster than most properties are prepared to handle but that chasing AI visibility without fixing the fundamentals of guest retention is a strategic mistake. The hotels most at risk, he contends, are independents that have neither invested in the tech stack needed to feed AI systems nor built the first-party data infrastructure to keep guests coming back.

BACKGROUND

The hotel distribution layer is shaped by the digital customer journey. Online distribution emerged as travel consumers moved online, while GDS distribution lost share as travelers preferred the convenience and choice of online channels over traditional agencies.

Mass adoption of AI platforms like ChatGPT, Claude, and Gemini is rapidly transforming the distribution layer for travel discovery, planning, and, soon, bookings.

Therefore, AI should be at the center of every property's technology decision, every process and procedure, and every operational and guest experience touchpoint.

The Digital Customer Journey and its pre-stay phases (Dreaming/Inspiration, Planning, and Booking Phases) are exceedingly complex, like a meandering river with dozens of digital touchpoints (Google claims 48).

AI platforms are now among the many digital touchpoints, accounting for 15%–17% of travel discovery (Amadeus, Future Partners).

Having established the impact AI is having on the distribution layer, let's examine its key components. Today's Digital Distribution "Master" Layer consists of two equally important layers:

- Guest acquisition layer
- Guest retention layer

THE GUEST ACQUISITION LAYER

The traditional digital guest acquisition layer comprises distribution strategies and best practices, specialized technologies such as cloud-first and mobile-first PMS, CRS, Channel Manager, WBE, and RMS, and digital marketing such as content marketing, search marketing, social media, and metasearch.

The explosive growth of AI platforms like ChatGPT and their agentic AI applications introduced another component to the digital acquisition layer: the need to "project" your hotel's ARI (Availability, Rates, Inventory) onto AI platforms to be included in trip recommendations and, in the near future, enable bookings.

This is the reason we will focus here on the distribution layer in the age of AI. IDC, the premier global market intelligence and advisory firm for the information technology industry, projects that 30% of all travel bookings will be executed by AI agents by 2030.

Enabling ARI on AI platforms is being done with the help of B2B AI connectors. AI connectors are "digital bridges" that link AI platforms like ChatGPT or Claude with external applications, enabling them to read data and execute tasks. In hospitality, B2B AI connectors are supposed to autonomously access ARI data from hotel PMSs, CRSs, WBEs, or Channel Managers, provide ARI recommendations, and facilitate bookings.

I do not think the time has come yet for travel consumers themselves to connect their personal AI agents to hotel reservation platforms via AI connectors. At this point, hotel ARI data is enabled on AI platforms via B2B AI connectors that remain invisible in the background, hidden behind the hotel brand.

Ex. DirectBooker, a B2B AI connector founded by Tripadvisor and Google Travel executives Steve Kaufer, Richard Holden, and Sanjay Vakil, just announced supply agreements with five hotel chains, including Best Western and Radisson Hotel Group.

AI platforms urgently need to monetize their traffic, since AI computing is exceptionally expensive. The quickest way to do so is to partner with well-established hospitality and travel brands and start earning affiliate commissions.

Google recently cited partnerships with global OTAs (Booking, Expedia) and global chains (Choice, IHG, Marriott, Wyndham). All of these travel brands have one thing in common: huge loyalty programs and widely recognizable brand names, making them appealing booking entities.

With this in mind, the question arises: What should independent hotels do?

Upgrading your property's tech stack to cloud-first and mobile-first technologies, such as PMS, CRS, RMS, WBE, and Channel Manager, has been a priority for more than a decade. What is new now is the growing need for your property to become an AI-first hotel company and to transform its tech stack accordingly.

To start benefiting from the exploding AI platforms, surpass your competition, and compete with OTAs for mentions, referrals, and direct bookings from AI platforms, take immediate action:

- Demand that your cloud PMS, CRS, or Channel Manager integrates with Google's UCP and AI platforms like ChatGPT via MCP or A2A using B2B AI connectors like DirectBooker. This will ensure your hotel's ARI data is projected onto AI platforms, search results, and trip recommendations (Cendyn is already enabling hotel direct booking rates to be visible in AI search results in partnership with DirectBooker. SiteMinder is already pushing live rates into ChatGPT via MCP).
- Invest in AEO (Answer Engine Optimization) to get the property's product and unique value proposition extracted and made visible in Answer Boxes and AI overviews (e.g., on Google Gemini).

- Invest in GEO (Generative Engine Optimization) to have the property cited by name and featured in AI trip planning recommendations (e.g., on ChatGPT).
- At the same time, do not forget to invest in traditional SEO to ensure your website ranks highly for relevant search results on Google and other search engines. Search marketing on Google and all its formats, Google Ads (GA), Google Hotel Ads (GHA), and organic listings (SEO), consistently contribute to over 50% of hotel website bookings. Google is not going anywhere. In Q1 2026, Google's search revenue grew by 19% YoY.

GUEST RETENTION LAYER

The Guest Retention Layer consists of CRM technologies (read CDP for upscale properties, midsize, and smaller hotel brands) and guest appreciation/reward program initiatives.

Guest retention is the most ignored component of hotel distribution. Many hoteliers do not even consider guest retention part of the distribution layer. Many hoteliers do not even know, let alone monitor, what percentage of their guests are repeat guests.

If 30% or 40% of your guests on any given night are repeat guests, how could repeat business not be part of the property's distribution strategy?

Today, repeat business largely determines the profitability and even the survivability of any property.

Because this important component is often ignored, on average, less than 10% of guests at independent hotels on any given night are repeat guests. Compare this to major hotel brands like Marriott and Hilton, where over 62% of guests on any given night are repeat guests.

Today, it costs 15–20 times as much to acquire a new guest as it does to retain a past guest. Unlike new guests, past guests already know your property, your product, and your location. All you need to do is convince them that your property's value proposition has not changed.

Apart from hotels in once-in-a-lifetime destinations, any independent hotel has ample opportunities to increase repeat business and turn past guests into brand ambassadors.

Implement CRM technology and launch a guest-appreciation or rewards program to increase guest retention and turn past guests into loyal brand ambassadors. Pair this with impeccable service that exceeds expectations. Take targeted action to maximize repeat business.

CRM TECHNOLOGIES

Today, less than 10% of independent hotels have implemented a meaningful CRM technology application as part of their hotel tech stack.

CRM technology ensures deep engagement with past guests, keeps "the conversation going," keeps guests engaged, and steers them in the right direction: booking your hotel again when they return to your destination.

How does CRM technology do that?

Today, first-party data is more precious than gold. First-party data includes customer data from past guests, logged-in website users, opt-in email subscribers, and lists of corporate travel managers, meeting planners, wedding and event planners, SMERF group leaders, and others with whom the property has done business, or at least communicated.

This data comes from the PMS, CRS, WBE, the property's website, opt-in email sign-ups, and even customer lists sitting on the laptops of sales and marketing personnel.

CRM technology aggregates all of the hotel's first-party data, which is then cleansed, deduplicated, enriched, and appended on an ongoing basis. As a result, the CRM provides "a single source of truth" for guest data and creates 360-degree guest profiles, augmenting them continuously with guest preferences, social media ambassadorship, customer engagement data, etc.

This CRM data allows ALL hotel departments, including sales and marketing, operations, and guest services, to do their jobs more efficiently and effectively.

CRM technology automates marketing communications with past guests during the pre-arrival, stay, and post-stay phases, as well as with corporate and group customers, including guest satisfaction surveys, guest retention marketing automation, drip marketing campaigns, guest recognition program management, and loyalty marketing.

In the pre-arrival phase alone, CRM technology enables marketing initiatives that can:

- Differentiate between people with or without reservations for the property.
- Customize pre-arrival offerings by arrival day.
- Inform arriving guests a week or a month prior to arrival about everything happening at the property during their stay, dinner buffets, entertainment, spa specials, etc.
- Offer upgrades to arriving guests, e.g., a suite upgrade offer to guests with 2+ stays at your hotel over the past 12 months.
- Send an early check-in special upgrade offer to guests arriving in the morning.

With advanced mobile check-in, the opportunities for personalization are limitless.

GUEST APPRECIATION/REWARD PROGRAM

For independents, a guest appreciation or reward program is much easier to implement and manage. Such a program can go a long way with guests and turn many of them into repeat guests.

A program like this could be based on perks such as early check-in, free breakfast or upgrades, or free room nights once a certain stay threshold is reached.

Hotels.com had a very simple program for over two decades: “Book with us 10 room nights, get the 11th one free.” This OTA amassed 70 million loyalty members before being merged into Expedia’s OneKey program.

I do not believe a points-based loyalty program is suitable for independent hotels, midsize hotel groups, and smaller hotel groups, unless they join a third-party loyalty program.

CONCLUSION

Today’s Digital Distribution “Master” Layer consists of two equally important layers: Guest acquisition and guest retention.

In this age of AI, there is a growing need for your property to become an AI-first hotel company and to transform its tech stack accordingly. AI should be at the center of every property’s technology decision, every process and procedure, and every operational and guest experience touchpoint.

To generate trip recommendations and direct bookings from AI platforms like ChatGPT, demand that your cloud PMS, CRS, or Channel Manager integrate with AI platforms via B2B AI connectors. Invest in AEO and GEO alongside traditional SEO.

Ignore the Guest Retention Layer at your own peril. Implementing CRM technology and a Guest Appreciation/Reward Program can double or triple the number of repeat guests and enable ALL hotel departments to do their jobs more efficiently and effectively.

HYB

Poor Hotel Data Is Killing Direct Bookings. C.U.P.S. Can Fix It

Pre-Stay

Daniel C. Doppler
President, Quinta

QUINTA
Quintessence of Data

Daniel Doppler opens with a simple experiment — ask an AI to recommend a hotel in your city — and uses the almost universally disappointing results to make a pointed argument: most hotels are invisible to AI not because of anything the technology does wrong, but because their own data is too fragmented, inconsistent, and unstructured for a machine to trust. His four-step CUPS framework offers a practical starting point for fixing that before the window closes.

For months, I've been running the same experiment with hotel managers around the world. I ask: *"Have you ever tried asking ChatGPT or Gemini to recommend a hotel in your city?"* Almost no one has. So I say: *"Try it. Now."*

The result is almost always the same. The AI returns three or four hotels. Theirs isn't on the list. Or if it is, the price is wrong, it mentions a spa that closed two years ago, or it lists outdated restaurant hours. Almost all hotels have a beautiful website, hundreds of blog posts, and great reviews, but to anyone searching through ChatGPT, Gemini, or Perplexity, it might as well not exist.

This is the early signal of a shift that, within two or three years, will decide which hotels keep capturing direct bookings and which ones will pay ever-higher prices to win them back.

Search no longer leads to links. It delivers answers.

For twenty-five years, hotel distribution was a fight for position on a results page: be at the top, beat the competition, outrank the OTAs. That fight is fading fast. Most searches today end without a single click. The AI-generated answer sits above everything, offering a recommendation before the traveler even considers visiting a website.

The consequence: the top of your sales funnel now closes with one answer already filtered, already decided. In the best case, the customer arrives on your site after the decision has been made elsewhere, without you.

Two internets now coexist. The first is the web of humans: pages, photos, and traditional SEO. The second is the web of agents, where ChatGPT, Google, and personal assistants act as distributors themselves, and recommend only what they can reliably read.

The center of gravity is shifting fast toward the second.

OTAS AND CHAINS ALREADY WON THE DATA RACE

What do LLMs use to generate answers? Structured data. Not marketing copy, but clean, standardized, machine-readable information: room type, real-time availability, amenities, conditions, exact location.

The major OTAs and large hotel chains have been structuring this data for two decades. The two distributors that dominate global hotel bookings didn't get there by accident. They spent years imposing a standardized format, scrubbing every listing, and synchronizing rates and inventory in real time. They hold the cleanest hotel catalog in the world, and that's the catalog the assistants now turn to.

They've also been the first to embed themselves in conversational interfaces. Several large chains are racing to do the same with their own data. When independent players all arrive at the same conclusion, it stops being a trend. It becomes a market law.

MOST HOTELS ARE INVISIBLE TO AI, AND IT'S NOT THE AI'S FAULT

When a hotel shows up poorly in an AI response, the AI is rarely to blame. The problem is the absence of reliable, machine-readable information.

For a typical independent hotel, rates differ across the website, OTAs, and PMS. Room counts vary across systems. A pool that closed last spring is still listed somewhere. To a human, these are minor inconsistencies. To a machine trying to produce one reliable answer, they're red flags.

Barely a quarter of AI responses about a hotel come from the hotel's official content.

I've run the test repeatedly: same hotel, same question, two assistants, two completely different answers. The AI isn't improvising. The underlying data simply isn't structured or controlled. And the consequence is brutal: faced with conflicting sources, the agent discards the unreliable one, usually the hotel, and trusts the consistent one, which is almost always the OTA.

Every discrepancy across your channels is a free space left to a distributor or a competitor.

AGENTS NEED STRUCTURE, NOT STORIES

Conversational AI doesn't return lists. It offers two or three options, sometimes just one, with a justification. And the queries aren't simple anymore.

Behind something like *"boutique hotel near Saint-Germain-des-Prés with a spa,"* a capable agent silently adds price, room specs, amenities, view, and a dozen other filters. Search intent has become multidimensional and heavily qualified. Only hotels with detailed, structured, current data can satisfy all the criteria, and only those hotels make the shortlist.

The advantage no longer goes to the hotel with the prettiest website. It goes to the hotel with the best-structured knowledge base. And the effect compounds: the more reliable a source is, the more often it's cited, and the more it becomes the default.

A KNOWLEDGE BASE IS NOT A COPY-PASTE OF YOUR WEBSITE

Many hoteliers assume they can just *"pull together what we already have,"* the website, a couple of brochures, and hand it to the AI. It doesn't work.

These sources are incomplete by design. Combined, they amount to maybe two or three hundred actual data points. A modern hotel is defined by roughly 4.000: accessibility, room-by-room amenities, dining, services, policies, and more. The gap is enormous. It's the difference between ticking three boxes out of four and ticking four out of four.

And piling heterogeneous sources into a system that "reads everything" doesn't add clarity; it adds confusion. The machine finds duplicates, contradictions, and outdated entries. It hesitates, then defaults to the intermediary. Keeping a patchwork like that current is, in practice, impossible.

Building a complete, standardized, exhaustive knowledge base and then maintaining it is unglamorous work. It won't drive a campaign. It never really ends. But it's non-negotiable. Trying to cut corners is like signing up for a triathlon and skipping the training. Structured data is swimming. Continuous updates are the cycling. Distribution is the running. In the age of AI, there are no shortcuts.

THE COST OF VISIBILITY IS GOING UP

The trajectory is clear. As discovery moves toward agentic search and intermediaries entrench their positions, hotels that AI can't read will watch their organic direct traffic dry up, then have to buy it back.

Advertising is shifting from chasing clicks to buying visibility. For hoteliers, that means paying more every year to stay visible, bidding on their own brand name, and accepting commissions on bookings that, yesterday, would have come in directly.

Tomorrow, without a strong presence in agent responses, visibility will have to be purchased. The longer you wait, the higher the entry fee.

DATA IS THE NEW DISTRIBUTION STRATEGY

"Direct booking" no longer just means avoiding OTAs. It means being more visible, more understandable, and more actionable to AI agents than your competitors, and showing up in their recommendations.

Data quality, long treated as a back-office chore, has become the core of distribution. Hotels should start implementing the four CUPS steps now:

- **Collect:** a single source of structured data, a source of truth: a deep, detailed, standardized database, ready to be distributed.
- **Update:** static data quickly becomes stale; updates must be easy to manage and automatically propagate everywhere.
- **Process:** deliver structured data consumable by machines (and also humans).
- **Share:** distribute across every channel (OTAs, GDSs, web, bedbanks) via APIs and MCPs, and expose your hotel directly to the agents.

When a traveler asks an AI where to stay in your city, will your hotel be the trustworthy answer the machine recommends, or will it point to a dubious source it sets aside in favor of your distributor or your competitor?

Search has moved from links to answers. The intermediaries understood it first and got there first. The window is still open, but it's closing as fast as the machines learn whom to trust. And that trust isn't won with a prettier website. It's won with clean structured data, and the unglamorous discipline of keeping it that way.

If you remember one thing, remember four letters: CUPS. Collect, Update, Process, Share.

It really is that simple.

HYB

Data Isolation Is AI's Biggest Obstacle in Hospitality

Pre-Stay

Frank Trampert
CRO, Revinate, Inc.

REVINATE

Frank Trampert argues that the hospitality industry's AI ambitions are being held back not by a lack of technology, but by a data architecture problem it has largely refused to confront. Using the recurring archetype of a loyal guest who remains a stranger across ten properties of the same group, he makes the case that cross-property behavioral intelligence is the real prize — and that data discipline, not more tools, is what stands between the industry and it.

The hotel industry is not short of ambition when it comes to artificial intelligence. Personalization at scale, pattern matching, real-time decision-making, guest intelligence—these ideas have been making the rounds on the conference circuit for the past few years. We're on the right track, but our data hasn't kept up with our goals.

The foundation for everything that AI promises is data. Right now, much of that data sits in silos. It's fragmented and lost across hundreds of platforms and screens. No model or algorithm can act on data it doesn't have.

At full power, AI can analyze behavior across a global portfolio, distill it into actionable insights, recommend your next move, and execute it in near real time. The gap between that vision and where hotels are today comes down to one thing: data isolation. It's the foundational barrier our business has been working around, and the problem we must solve before we can realize any of the exciting promises of AI.

Before any hotel can think about cross-property intelligence or portfolio-wide pattern matching, they have to solve a more immediate problem. Their own data is a mess.

The average hotel collects guest information across the front desk, the spa, the restaurant host stand, the pro shop, or the loyalty database. None of these were designed to talk to each other. A guest who checks in, grabs a drink, books a tee time, and orders late-night room service leaves data across a handful of separate systems. The hotel rarely sees the complete picture.

You cannot send the right offer to the right guest at the right time with that incomplete profile. Clean and unified guest profiles are table stakes. The hotels that have not yet solved these problems are not ready for AI. When you do get it right, the benefit is tangible. You're seeing increased open rates from targeted campaigns, more RevPAR from those campaigns, and guests who feel recognized. But these outcomes, relative to what comes next, are a ceiling.

THE GM, THE LOYALTY CARD, AND THE CEILING THEY SHARE

There's a version of guest intelligence that the world's best hotels have had since the days of paper ledgers and physical room keys. It's the GM that knows the regulars and their preferences—the corner room, which whiskey they drink, and their kids' names. That's the kind of recognition that has always built loyalty. And it works on the scale of a single person's memory at a single property.

Loyalty programs were the industry's attempt to scale that primitive form of guest intelligence. They were built to carry guest recognition across properties within a single brand, making sure that a loyal traveler felt known at every property in the chain, even ones they've yet to visit. What those programs offered was a more advanced version of what the great GM was already doing. It's faster, more consistent, and larger in scale, but fundamentally the same thing. And they only worked within a single chain. It didn't work for management groups operating mixed portfolios. Most of what the industry calls AI today is a faster version of the same thing: better recall, same roadblocks.

Take Caroline Brittel, a guest archetype hiding in plain sight across most hotel portfolios. She takes a different spring break trip every year – always within the same hotel group, different property, different country, same pattern. She books in October for the following March. Always requests a pool or ocean view. Big spender at the spa. She has done this for the past decade.

Every hotel Caroline has ever stayed at has had one entry in its system. One stay. One record. One guest who may or may not come back. None of them knows she is a spring break traveler or how to reach her in October. None of them knows about the water view or the spa. The data that would tell them all of this exists — distributed across ten properties that have never shared a signal.

Caroline is not invisible because the data does not exist. The frustrating part is that everything needed to know about Caroline exists within one organization. She is not lost to a competitor's database or hidden behind an OTA. She is a guest of the same hotel group — checked in, paid, reviewed, and gone — across ten properties that have never compared notes. The data is there. The architecture to use it is not.

THE NEXT FRONTIER: CROSS-PROPERTY BEHAVIORAL INTELLIGENCE

The GM's memory and the loyalty card were both recognition systems. What becomes possible with cross-property behavioral intelligence is something different: pattern detection across data that no individual hotel has ever had access to. The behavioral signals distributed across thousands of properties, analyzed simultaneously, reveal patterns that are invisible at the property level. Caroline Brittel's October-March travel rhythm. The "bleisure" traveler who adds room nights and upgrades every time. The family that plans two years out. These patterns exist in the aggregate, and always have. The industry has never been able to see them.

Getting there requires solving a data architecture problem that the industry has largely avoided confronting. Connecting real guest data across properties at scale poses a serious risk of exposure under GDPR and similar privacy regulations. You can't merge millions of guest records and mine them for patterns without running into data privacy requirements that exist for good reason.

The architecture that makes cross-property intelligence possible while respecting privacy is to anonymize data and work at the behavioral layer. Strip out the identifiable information — names, emails, any details that identify an individual — and analyze what remains: the behaviors. When someone books, how far in advance they book, what they spend, and what they request. These signals, analyzed at scale, reveal the patterns. Once identified, the AI can apply the patterns to real guest data to drive real outcomes — without the analysis ever touching personal information. Privacy stays private.

Hotel groups are sitting on something no individual property has: a portfolio view. The guest who stays at the budget property in Chicago and the flagship in Dubai is a stranger at both. Somewhere in the enterprise, that relationship exists in its entirety. Most groups have never been able to see it.

FROM DETECTION TO EXECUTION

Pattern matching is only the start. The more important part is doing something with them before the opportunity is lost.

Even at the property level, hotel sales and marketing teams are short on time, not data. An AI system that only surfaces insights when someone thinks to query it is an improvement over what exists now, but a marginal one at best.

The real shift comes from reactive to proactive systems: AI that watches the data continuously, flags the signal when it appears, and acts — without waiting for a person to start the process.

Caroline Brittel is due to book this October. A proactive system already knows that, because it's seen the pattern. It doesn’t wait for her to start searching; it reaches her with the right offer at the right time on her preferred channel. The hotelier sets the guardrails like brand standards, offers, details, and channels, and AI tools operate within them using a wealth of data we haven't seen before. All at a speed and a scale that no human team can match on their own.

This is the version of AI in hospitality that the industry has been dreaming of. It requires data discipline to get there. Without unified property-level data, cross-property intelligence is impossible. Without cross-property intelligence, the patterns remain hidden in the ether. Without the patterns, the AI has nothing real to act on beyond what we have right now.

WHAT HOTEL GROUPS SHOULD PRIORITIZE NOW

To get from where we are today to where we need to go is a process, not a jump.

The first move is to unify data at the property level, connecting systems that currently operate in isolation into a single guest record that reflects the full picture of every stay. This is foundational, and nothing else works without it.

The second move is to ask harder questions about your enterprise data. Specifically, whether those systems across the portfolio can share signals in a way that is both technically and privacy-sound. That means a data layer that anonymizes guest records before any cross-property analysis touches them. It preserves the behavioral signal while stripping the personal detail. Most groups do not have this yet. Those who start building toward it now will not be scrambling to catch up when the tools that require it become standard.

The third move is the most important one. Ask what the AI system tells you when you are not looking. A system that only answers when asked is a dashboard with better branding. The bar worth setting is proactive intelligence — pattern-based, operating within your guardrails, acting before you think to look.

The data discipline required to get there is unglamorous work. It is also the only thing that separates AI that performs from AI that promises.

Caroline Brittel books a different trip every October. The hotel groups that know that will earn her loyalty. The ones that don't will be meeting her for the first time every time.

REVINATE

Hi, I'm Ivy!

The future of **hospitality intelligence** is bright.

Meet me at HITEC 2026

BOOTH #3418

HYB

Synthetic Persuasion: AI and the Evolution of Marketing

Pre-Stay

Neil Foster
Hospitality Technology Advisor, Techtonic Hospitality Services

Neil Foster maps the collision between hospitality's two tectonic forces — human connection and operational optimization — and argues that AI has become the primary mechanism through which synthetic persuasion now operates: shaping discovery, engineering desire, and guiding decisions through systems so seamlessly embedded that they no longer feel like persuasion at all. The critical question he leaves open is whether that same technology can amplify genuine care rather than replace it.

> *We are what we pretend to be, so we must be careful about what we pretend to be.*
>
> *— Kurt Vonnegut, Mother Night*

DISCOVERY, DESIRE, AND DECISION: BENEATH THE SURFACE OF HOSPITALITY

The landscape of modern hospitality sits at the cusp of a violently transforming world. Beneath the visible surface of hotel operations, booking systems, loyalty programs, guest engagement platforms, online travel agencies, revenue management systems, and AI-powered marketing engines, pressure continues to build between two cornerstone priorities of the industry: human connection and operational optimization. Like tectonic plates negotiating equilibrium beneath the earth's crust, these forces are grinding together in a powerful convergence, reshaping the commercial structure of hospitality and the nature of the persuasion.

Historically, hospitality marketing relied on human influence. From reputation and storytelling, one makes a new discovery. The atmosphere, like the alluring aroma of freshly baked bread, leads to desire. Decisions ultimately came down to trust, sealing the deal with reputations on the line, based on promises of safety, consistency, and being cared for. Human risk management. Whether recommended from a seasoned Les Clefs d'Or concierge, a reputable travel agency, or a close family friend with similar tastes, persuasive power anchored in experience, expertise, and recognizably human intent is powerful.

Artificial intelligence now embeds itself beneath much of modern hospitality infrastructure. With information sources unverifiable, incentive structures unclear, and accountability nonexistent, the trust placed in these systems can only be attributed to the "wisdom of the crowd" phenomenon, credited to Aristotle. Along the modern customer journey, recommendation engines influence visibility, dynamic pricing systems dictate perceived value, and customer data platforms predict booking behavior. Veering off the path with an unemptied shopping cart, conversational systems simulate attentiveness. The convergence of the trusted human with controlled algorithms: synthetic persuasion has arrived.

Unlike traditional persuasion, which is concerned only with sharing value, synthetic persuasion is an entire electronic ecosystem of prediction, shaping, and optimization. The guided journey reinforces human behavior through increasingly invisible systems of influence.

Countdown timers, dynamic pricing, flash deals, one-click payments, "you might like this," internet web trackers — all designed to minimize hesitation and convert. Like flowing lava, a digitally mediated landscape has all but engulfed the traditional human-influenced marketplace, and its influence increasingly shapes reality.

Whether technology buries authentic human connection beneath optimized systems or serves as a foundation for meaningful human care to scale without losing its soul will ultimately determine the future and fate of hospitality.

DISCOVERY: HYPERREALITY AND THE SIMULATION OF HOSPITALITY

The first tectonic plate may be described as the "human connection plate," representing hospitality's relational and expressive side. Embedded in the psychology of belonging, hospitality at its best forms a "warm" interface of human connection. Anticipation, welcome, empathy, storytelling, recognition, and care remain central to the experience despite major technological advances.

With a pinch of healthy friction sprinkled into the mix and a keen pursuit of the interesting questions over the easy answers, the strongest connections emerge from the messy unraveling of ambiguity. Hospitality has never been perfectly efficient, and this may be by design. Wherever "friction" appears, an opportunity for authentic human connection exists. Hospitality and humanity at their best are brought to light wherever humans draw from untapped creativity, flexibility, and resourcefulness to navigate uncertainty together. Nothing beats the rare moment we are called to rise to the occasion. Fully frictionless leads to lost opportunities.

Opposing the qualitative force of hospitality is the "optimization plate," representing the analytical and procedural side of commercial operations. Juxtaposed against the warmth of human connection, optimization forms the cold counterbalance of business obligations. Optimized efficiency is driven by predictive analytics, automation, conversion metrics, process orientation, labor efficiency, scalability, and shareholder returns.

Optimization is increasingly pre-empted by AI-enabled systems. Revenue management platforms dynamically adjust room pricing based upon demand elasticity, competitor positioning, booking pace, weather patterns, and consumer behavior. Recommendation engines determine visibility across online travel agencies. Loyalty systems continuously evaluate profitability scenarios, predicted spend, and high-lifetime-value guests. The objective is transparent, especially for scaling up: reduce uncertainty, eliminate friction, and maximize measurable outcomes.

On the guest side, an equally significant shift is taking place. As philosopher Jean Baudrillard described, the real becomes hyperreal when simulations become more influential than the underlying experience. In the hyperreality of hospitality, guests access information indirectly through layers of digital interpretation, tailoring perception before the tangible experience begins.

For the traveler, a customized, curated landscape of hotels — shaped by review scores, sponsored placement, algorithmic ranking, AI-generated summaries, influencer content, scarcity prompts, and personalized recommendation engines — is filtered and presented online for viewing pleasure. It has become increasingly rare and difficult to find hotels organically, as representation progressively precedes reality.

For the guest, the hotel's digital identity comprises reviews, photography, reputation score, search ranking, and social visibility, carefully controlling perceptions before a guest ever enters the lobby. The hotel exists for the guest first as a simulation.

Online travel agency ecosystems intensify the phenomenon further, where platforms such as Booking Holdings and Expedia Group no longer function as neutral marketplaces. Through algorithmic ranking, behavioral targeting, urgency messaging, and recommendation systems, visibility is shaped by invisible forces. A guest may believe they are freely discovering the "best" option while navigating an environment carefully optimized to influence perception and conversion. The most powerful systems of influence feel natural. In *The Truman Show*, the environment draws out specific behaviors while preserving the illusion of autonomy. Similarly, consumers remain largely unaware of the invisible architecture guiding perception, emotion, and decision-making around them in new and unfamiliar places. As media theorist Marshall McLuhan famously observed, "The medium is the message." The systems through which guests discover experiences are restructuring how hospitality is discovered and communicated.

DESIRE: FEEDBACK LOOPS, HYPER-PERSONALIZATION, AND EMOTIONAL ENGINEERING

If discovery commands attention, desire draws emotional pull. Hospitality marketing has always relied upon aspiration and imagination to connect with potential guests. Unlike lodging, hospitality promises intangible benefits. Luxury hotels sell status, a wellness retreat facilitates reinvention, a resort promises escape from everyday life, and a boutique hotel shares culture. If the aim is to also travel inward as much as outward, emotional possibility is as valuable as the physical product. Desires are aroused through creativity, storytelling, and atmosphere, and individuality is a hunger to be satiated. We relish the idea of choosing from the "buffet" while being pushed towards the "set menu" of synthetic desire. Ironically, our options are increasingly ready-made by the well-fed optimized algorithm.

Two guests searching for the same room may now experience entirely different emotional responses, depending on their inferred psychological profiles. One guest seeking safety and convenience may see family-oriented imagery, while another finds messaging relating to exclusivity, status, or a romantic getaway. When dynamically engineered desire is the path, "all roads lead to Rome." Accordingly, the systems offer customized imagery, messaging, pricing, package structures, and promotional timing based on behavioral analysis feedback, running continuously behind the scenes.

Recommendation systems train and reshape through continuous feedback loops in a perpetual state of iterative refinement. The more interaction with the platforms, the more effectively those systems predict future behavior — and in turn, those predictions influence future consumer choices, which then retrain the systems again. A classic feedback loop, the synthetic persuasion machine grinds on, binding product with predetermined desire. At what point does personalization become manipulation, and when does predictive convenience threaten to eliminate independent thought and decision-making?

Aldous Huxley reimagined a population governed in a state of pleasure, surrounded by convenience, subject to conditioning, and filled with engineered desire in *Brave New World*. Unlike the obvious problems with embracing a dystopian life of sacrifice and misery, resistance is the unlikely response to a lifestyle of comfort and amusement — until it's too late. Soon, the guided journey of desire will become so deeply embedded psychologically that visibility into the mechanics of choice will eventually be lost in a sea of frictionless booking flows, emotionally optimized guest messaging, and hyper-personalized recommendations. Malicious intent is not necessarily the intent, and in many cases the systems are genuinely designed to improve the guest experience and operational efficiency — yet invisible influence remains, nonetheless.

Another, more optimistic scenario emerges from the tectonic collision: not lava, love. When implemented thoughtfully, artificial intelligence may be the perfect tool to amplify authentic hospitality rather than erase it. Through intelligent systems that empower employees with better-quality information, administrative burden is reduced, with more space for meaningful human interaction. A front desk associate may deliver superior care with support from systems displaying intelligent guest profiles. Wherever the technology eliminates repetitive operational minutiae, it not only encourages improved personalization of service delivery but also introduces potential for positive friction to emerge — relationship building. Technology, configured for love, is an amplifier of humanity instead of a synthetic substitute for it.

As John Culkin observed through the work of Marshall McLuhan, "We shape our tools, and thereafter our tools shape us." Lava or love, the tools we build today and how we use them will inevitably influence the impact of human connection and how we desire.

DECISION: TRUST, AI AGENTS, AND THE FUTURE OF HUMAN-LED HOSPITALITY

If hospitality is premised on trust, an obvious difference between human and synthetic persuasion is relatability. Earning our emotional trust in identifying safety, belonging, anticipation, comfort, and care is therefore the greatest obstacle to overcome. With widespread acceptance of synthetic persuasion in the discovery and desire phases, full AI agent-initiated decision-making is within reach.

Early demonstrations of consumer-facing AI agents suggest it's now possible to do it all: comparing hotels, optimizing itineraries, entering loyalty details, and ultimately making purchasing decisions. A "human in the loop" is only needed as a gatekeeper for final validation and as custodian for account and payment details. In a future without cues for human intuition and emotional nuance, we're all-in on trust — and any distinction between authentic care and synthetic empathy becomes nearly impossible. If AI agents do the thinking, feeling, and doing on our behalf, is it still hospitality?

On the ground, the role of instinct-driven hotel managers connecting with guests has pivoted to data-oriented optimizers guided by dashboards, predictive analytics, and optimization systems. The digital feedback loop, changing human behavior and leaning towards left-brained optimization, has already impacted the structure and needs of hospitality leadership.

Human hospitality still very much depends upon intuition, empathy, creativity, and emotional nuance alongside logic, measurement, and efficiency. The successful leaders of the future can harmonize both.

CONCLUSION: BENEATH THE MACHINERY OF OPTIMIZATION

The tectonic plates beneath hospitality remain locked in perpetual negotiation: optimization, simulation, and efficiency to one side; human connection, authenticity, and intuition on the other.

Artificial intelligence has already impacted the engineering of discovery, the formation of desire, and the pathway from options to decisions. In the process, hospitality risks drifting toward a world where synthetic persuasion becomes increasingly indistinguishable from authentic human care.

The future of hospitality may ultimately depend on whether intelligent systems become the lava that buries human connection beneath optimized performance, or the foundation upon which authentic human care can scale without losing its soul.

Beneath the layers of optimization, the defining question of hospitality remains unchanged: in a world increasingly shaped by technology, will people still feel genuinely seen by one another?

HYB

The Signal Was Always There. We Just Had No Way to Capture It.

Pre-Stay

Are Morch

Digital Transformation Coach for Hotels, Are Morch, Digital Transformation Coach

ARE MORCH
DIGITAL TRANSFORMATION COACH

Drawing on a career that moved from reservation phones to housekeeping supervision to manager on duty, Are Morch argues that the real pre-stay challenge has never been technological — it has always been a signal problem. The guest intent is there, the data exists across departments, but without a system to capture and connect it, every interaction starts from scratch and the intelligence is lost.

My first job in the hotel industry was answering phones for a reservation center in Charleston, South Carolina.

The work sounds simple when you describe it that way, and in some respects, it was. A caller wanted a room. I found them a room. The transaction was completed.

But I learned early that the transaction was never the point.

The calls that stayed with me were the ones where the caller did not yet quite know what they were asking for. A man would call and say he wanted something quiet, maybe near the water, not too far from the historic district. He was planning something for his wife's birthday and wanted it to feel special without being pretentious. He had a budget but was willing to go a little over if it was worth it. He had not chosen a hotel yet. He had barely chosen a destination.

What he was doing, in the language that did not exist then, was expressing intent. He was generating a signal. And I had nothing to capture it with except my own attention and whatever I could recall from a printed reference sheet about properties I had never visited.

The rule I set for myself in that role, and one I carried through every position that followed, was simple.

Always be prepared for the next guest, no matter what.

Not the guest currently on the line, who had already decided to call. The next one. The one whose signal I had not yet heard. That discipline of preparation, of maintaining a state of readiness before the demand arrived, was the closest thing to a signal intelligence system that my role allowed. It was also, I would understand much later, a form of Blue Ocean thinking applied instinctively. While other agents waited for the call to define the interaction, I was trying to anticipate the space where the guest was not yet standing but would soon be.

WHAT THE FRONT DESK REVEALED

When I moved to a front desk role at a three-hundred-room Sheraton in North Charleston, the signals did not disappear. They simply changed form.

Now I was reading them in person rather than over the telephone. And something unexpected happened.

My accent, which had caused callers at the reservation center to occasionally assume they had reached a call center overseas, became at the front desk one of my most useful assets. Guests noticed it. They asked where I was from. The conversation opened in a way that a standard check-in exchange rarely does.

My aptitude for reading what a guest needed, my attitude toward finding a way to deliver it regardless of whether it was on any checklist, and that initial moment of curiosity combined to create something I could not have scripted. Guests who might have completed check-in as a transaction instead completed it as a beginning. They left the desk carrying a small story, something unexpected, a recommendation they had not asked for, a detail noticed, a gesture made.

Those moments were not efficient in any measurable sense. They were unreasonable in the best possible meaning of the word, far beyond what the situation required, and precisely because of that, they were the moments guests returned to tell someone about.

What I discovered, without the framework to name it, was that my most effective competitive space was not the one everyone else occupied. The front desk agents who competed on speed, accuracy, and procedural efficiency were operating in a well-defined and crowded lane. The space I had found, where a Norwegian accent and genuine curiosity about the person standing in front of me created a moment of connection that a script could not replicate, was effectively uncontested. Nobody else was competing there because nobody had thought to.

That is the instinct behind what strategists call Blue Ocean thinking, the deliberate choice to create and occupy a market space where the rules of competition have not yet been written, rather than fighting harder in a space where the rules already belong to someone else.

The guest who arrived distracted, checking their phone, glancing around the lobby, could be brought into the present moment by the right exchange. The couple who arrived later than their stated check-in time and asked quietly whether the room had a good view were telling me something about what the stay was really for, and it had nothing to do with the rate they had paid.

Being prepared for the next guest meant being ready to read those signals and act on them before the guest had to ask for anything.

THE FLOOR TAUGHT A DIFFERENT LESSON

Housekeeping supervision gave me a perspective that neither the reservation desk nor the front desk could offer.

Thirty housekeepers. Multiple floors. The compressed scheduling pressure of check-out and check-in happens simultaneously. The work was entirely operational, and yet it was inseparable from the guest experience in ways that the rest of the building did not always acknowledge.

What I discovered on the floor of housekeeping was that the signals the hotel had collected about its guests, their preferences, their patterns, their unspoken expectations, almost never reached the team responsible for the physical space where the guest would form their most lasting impressions. The front desk knew things about the returning guest that the housekeeping team never heard. The reservation notes captured details that evaporated somewhere between the booking system and the room assignment sheet.

Intelligence existed. It was simply not flowing to the people who could have used it.

I also discovered something about the nature of consistency that I have not stopped thinking about since. A guest who stays at a property twice and receives different experiences on each visit does not conclude that the hotel had an off night. They conclude that the first experience was a matter of luck.

Consistency is not the absence of variation. It is the presence of a system that ensures the signal intelligence gathered during one interaction informs every subsequent one.

The uncontested space I had found at the front desk was only valuable if it could be sustained. Without a system to carry the signal forward, every guest relationship had to start from scratch.

THE MANAGER ON DUTY AND THE PUZZLE COMPLETING ITSELF

It was the manager on duty role for the evening shift that brought the pieces together.

At the start of every shift, I walked through every department before I did anything else. The front desk, housekeeping, the restaurant, maintenance, and the back office. Not to inspect, but to read. What signals were each department carrying into the evening? What had happened during the day that would shape what the night needed from the building?

That daily walk was the closest thing to a unified signal intelligence system that existed in the hotel at the time, and it existed entirely in my head.

I was the connective tissue between departments that were otherwise generating signals independently and sharing them only when something had already gone wrong. When a booking pace anomaly appeared in the front desk count for the next seventy-two hours, I was the person who connected it to a local event that maintenance had mentioned in passing and a staffing pattern that housekeeping had flagged that afternoon. Nobody had a system for doing that. Somebody had to be the system.

The discipline of always being prepared for the next guest scaled up in that role into something larger. Being prepared for the next shift. Being prepared for the next occupancy peak. Being prepared for the demand that had not yet arrived, but the signals were already describing it if you knew how to read them.

The moments of unreasonable hospitality that I had learned to create at the front desk were not accidental. They were the product of preparation, of signal intelligence gathered across every department and translated into readiness before the guest ever walked through the door. That is the entire logic of the pre-stay phase, the intelligence gathered before arrival that determines the quality of everything that follows.

I ended every shift report with a note about something specific that had gone well that day. Something a team member did that was worth recording. It was a small habit, but it came from the belief that signal intelligence should produce recognition as well as accountability. The signals that tell you what is working are as important as the signals that tell you what is not.

WHAT THIS MEANS FOR PRE-STAY IN 2026

The hotel industry is now being asked to make sense of an AI landscape that promises to transform how guests discover, evaluate, and choose accommodation. The conversation is largely driven by technology vendors and distribution strategists focused on the booking funnel as a technical problem to be optimized.

That framing is useful, but incomplete.

What I observed across four roles inside the same industry is that the guest journey is not primarily a technical problem. It is a signal problem. Travelers generate enormous amounts of meaningful signals during the pre-stay phase, signals about who they are, what they are hoping for, what would make them choose one property over another, and return to tell someone about it.

Phocuswright research found that nearly 40% of US travelers used generative AI tools to plan trips in 2025, an 11-point increase in just one year, with AI becoming the new front door for travel discovery as traditional search loses ground to conversational intent. BCG and PR Newswire research cited by OtelCiro found that 82% of hotels planned to expand their use of AI in 2026, up from 63% in 2024. But investment in AI without the signal infrastructure to feed it produces more sophisticated confusion rather than more useful intelligence.

The large chains and the major OTAs are investing in AI to automate the same transaction layer that every other large organization is automating. Every one of them is competing in the same ocean, on the same terms, with the same tools.

The competitive space that opens for independent and boutique hotels is not in that direction. It is in the direction that scale prevents.

The kind of intimate, cross-departmental signal intelligence that turns a discovered property into a chosen one, and a chosen one into a returned-to one, is the intelligence that cannot be manufactured at volume. The accent that opens an unexpected conversation. The preparation that anticipates what the guest needs before they ask. The gesture is unreasonable precisely because nobody required it.

These are not features of a technology platform. They are the product of a human operating system that reads signals, stays prepared, and finds its competitive advantage in a space the chains cannot enter because their scale is what prevents them.

The signal was always there.

The question for every boutique and independent hotel in 2026 is whether they have built the system to capture it.

HYB

Do You Think You're Ready for A2A Commerce?

Pre-Stay

Ira Vouk
Hospitality Tech and AI Consultant, Hospitality 2.0 Consulting

IRA VOUK
HOSPITALITY 2.0
WWW.IRAVOUK.COM

Ira Vouk challenges the industry's comfortable assumption that agentic AI is still a distant, chatbot-adjacent phenomenon. The real disruption, she argues, is not travelers talking to AI assistants, it is machines negotiating directly with machines, and a hospitality infrastructure built entirely around human browsing behavior that is nowhere near ready for it.

You wake up on a Tuesday morning and casually say to your AI assistant:

> *"Find me a beachfront hotel in San Diego for three nights in July. Quiet at night, strong Wi Fi, healthy breakfast, walkable area.*

A few seconds later, you receive a notification: "I booked this for you."

Most people picture Agentic AI bookings as instant, casual, hands-off transactions. However, this vision is far from reality. Today, travelers rarely book hotels simply by issuing a quick voice command to Alexa.

In reality, most (true) A2A flows will start scaling in the corporate segment before they infect leisure. And many flows will not involve any user input, not even voice. Full automation.

So while corporations may develop their own agent systems for managed travel, it is very likely that most leisure bookings will continue happening through major AI platforms (OpenAI, Gemini, etc.) in an "AI-assisted" manner, not in a fully "AI-executed" A2A way.

It does NOT eliminate the fact that A2A is a thing and is becoming more of a "thing" as the days go by. There will absolutely be a day, sooner than you think, when a traveler's AI communicates directly with a hotel's AI to check availability, confirm loyalty benefits, and book a room.

No manual input, not even saying a word to Alexa. No browser tabs opened. No scrolling through reviews. No comparing rates across six different websites while questioning whether the pool photos were taken recently or sometime during the Obama administration. No retargeting ads follow the traveler around the internet for the next two weeks after they abandoned the booking halfway through.

Just machine-to-machine collaboration. And not just collaboration, but negotiation as well. That's the key part. They'll actually talk back and forth, not just take orders. Argue a bit, maybe. And then come to a consensus on how good a deal you'll be getting.

This sounds futuristic, but it is already happening. Don't sleep through it. Read further.

THIS IS BIGGER THAN CHATBOTS

Most hospitality conversations about AI still focus on visible use cases: chatbots, trip planners, recommendation engines, concierge assistants, and conversational search. Those are AI assistants.

Those applications matter, but they are only the surface layer of what is happening.

As these systems become more capable and trusted, travelers will naturally delegate more decisions to them and turn them into AI agents.

There's a subtle difference between the two: ACTION. An assistant answers your question about which hotel is best to choose. An agent goes and books it for you.

The real transformation is not about how travelers interact with AI, but about AI systems increasingly connecting and negotiating directly with other AI systems and supplier infrastructure: removing humans from the process.

That changes the mechanics of commerce itself.

For the last 30 years, hospitality distribution and the entire commerce layer have been built around one core assumption: somewhere, a human being is sitting at a screen trying to decide where to stay. Everything evolved around influencing that human during the decision-making process. Hotel websites became digital storefronts. Booking engines became conversion funnels. Revenue strategies, SEO, metasearch, loyalty programs, review management, and digital marketing all evolved around understanding how humans browse, compare, hesitate, change their minds 20 times, and eventually book.

The industry became exceptionally good at optimizing for human behavior.

But what happens when the browsing itself starts disappearing?

And THAT creates a shift most people in our industry are still underestimating.

AI is fundamentally altering the customer's identity. The crucial shift is from the traveler to the AI agent, which acts on the traveler's behalf.

That is the philosophical shift.

EXPLAINING A2A: MACHINES TALKING TO MACHINES

Emerging frameworks such as the Model Context Protocol (MCP), Agent-to-Agent communication (A2A), and related orchestration standards are beginning to build the infrastructure layer for autonomous commerce.

The terminology can sound intimidating, so don't worry about all the abbreviations. Worry about the underlying idea, which is relatively straightforward.

MCP helps AI systems securely access data sources, such as hotel rates and special offers. A2A enables AI systems to communicate and coordinate with one another. Together, they create environments where autonomous agents can discover information, compare options, negotiate conditions, verify details, and complete transactions with minimal or zero human involvement.

But the important part is not the technology itself. The important part is what the technology enables.

AI shifts from being conversational to operational.

And once AI becomes operational, the distribution structure begins to change.

This brings us to a crucial implication. Hotels Optimized for Humans. AI Doesn't Care.

At first glance, the idea of "machines booking travel" may sound like simply another interface evolution. In reality, it changes the meaning of optimization entirely.

Humans browse emotionally. Humans get distracted. Humans are influenced by photography, storytelling, brainwashing, urgency messaging (OTAs are really good at that), branding, and polished user experiences. Sometimes they abandon a booking because they got interrupted by their cat or suddenly decided they should "think about it."

Machines do not behave that way.

Hotels, and OTAs for that matter, optimized their online presence for humans. AI does NOT care whether your homepage has cinematic drone footage, elegant typography, or a beautifully animated "Book Now" button.

AI systems evaluate something entirely different. They care about structured data, machine-readable policies, trusted inventory access, contextual relevance, interoperability, fulfillment confidence, and real-time accuracy.

A human traveler may fall in love with a hotel because the website made the property feel aspirational or romantic. An AI agent may prioritize a completely different hotel because its cancellation policies are easier to interpret programmatically and its room attributes are consistently structured across systems. Because AI agents are nerds with OCD.

This distinction (machines evaluating by logic instead of emotion) redefines competition and requires a new approach.

For decades, hotels competed for human attention inside search engines, OTA listings, metasearch rankings, and social feeds. But in an AI-driven environment, visibility increasingly depends on whether machines can properly access, interpret, and trust your information.

So... we are approaching the end of the browsing era.

Not overnight, of course, let's admit it, nothing in our industry happens overnight... except for the hotel stay itself. Leisure travel, in particular, will remain highly emotional and aspirational for a long time. Humans will still browse, dream, compare, and spend entirely too much time convincing themselves they need the oceanfront suite they technically cannot afford.

But consumer behavior rarely changes all at once. It evolves gradually until old habits quietly become inefficient.

Nobody announced the official death of travel agents. Nobody held a ceremony for the end of paper boarding passes. Consumer behavior simply evolved alongside technology until older behaviors slowly became uncool.

The same thing may, and probably will, happen with browsing.

THE POWER SHIFT: A ONCE-IN-30-YEAR RESET

This moment represents something much larger than another technology cycle.

AI-driven distribution creates a once-in-a-lifetime opportunity for hotel companies to regain control over direct distribution before intermediaries fully reposition themselves.

The last major restructuring of travel distribution (remember the early days of the internet?) fundamentally shifted power toward intermediaries because they became better at organizing and centralizing fragmented inventory and simplifying discovery. Hotels slowly adapted after the fact, often realizing too late that much of the influence had already moved beyond their control.

Now the orchestration layer is being rebuilt again. DO NOT SNOOZE THROUGH THIS ONE!

Whoever controls orchestration controls demand flow.

This strategic moment is urgent. Only swift action will enable hotel brands to control the future of distribution.

If hotel brands fail to build agent accessible infrastructure, intermediaries will once again become the orchestration layer between demand and supply. Only this time, the interface itself may begin disappearing. The traveler may never even reach a hotel website before options are already filtered, prioritized, negotiated, and influenced by the size of the OTA commission, somewhere outside of your control.

The future of travel may never reach your website.

That possibility sounds dramatic, but parts of it are already becoming visible. AI assistants are increasingly becoming the first point of interaction between consumers and digital commerce. As those systems improve, travelers will naturally delegate more transactional decisions to them because convenience almost always wins eventually. And that naturally will turn them into AI agents. And that will slowly lead to the real dawn of A2A.

The companies that control machine orchestration may ultimately control visibility itself.

THE HARD TRUTH: HOSPITALITY IS NOT READY

Unfortunately, the industry's underlying infrastructure remains deeply fragmented and poorly prepared for autonomous commerce.

Property management systems, CRSs, booking engines, loyalty platforms, customer data systems, and revenue tools often operate like neighboring countries reluctantly exchanging information through aging diplomatic channels, fax machines, or pigeons. APIs remain inconsistent. Data structures vary wildly. Loyalty systems were not designed for machine negotiation. Room attributes are often incomplete, inconsistent, or impossible for autonomous systems to interpret reliably.

Even basic interoperability remains a challenge across large parts of the industry.

That becomes a serious problem when machines increasingly communicate directly with other machines.

The challenge is not that AI capabilities are advancing too quickly. The challenge is that hospitality infrastructure is advancing too slowly.

THE PHILOSOPHICAL SHIFT

For decades, travel commerce was built around influencing human choice.

Now we are entering an era in which decisions may increasingly be made by machines before humans ever enter the process.

That changes the role of discovery. It changes the role of marketing. It changes the role of distribution itself.

The question is no longer simply: “How do hotels market to travelers?”

The more important question may become: “How do hotels become understandable, trusted, and accessible to machines acting on behalf of travelers?”

The new customer may no longer be the traveler. It may be the system representing them. Right now, the hospitality industry remains unprepared.

But that can change. If we don’t snooze through it again…

HYB

When AI Becomes the Travel Agent

Pre-Stay

Pablo Delgado
Managing Partner & CEO America, Mirai

mirai

Pablo Delgado argues that AI assistants are not simply adding another channel to hotel distribution — they are compressing the entire travel funnel into a single conversation, potentially owning discovery, consideration, and transaction in one pass. The hotels that wait for certainty before adapting, he warns, risk repeating the same mistake they made when OTAs arrived.

HOW AI ASSISTANTS ARE MOVING BEYOND SEARCH AND INTO DECISION-MAKING

THE INTERFACE IS CHANGING, NOT THE TRAVELER

Travelers still follow the same journey they always have: discover, evaluate, and book. What has changed is the interface through which those decisions are made.

Physical travel agents gave way to online travel agencies. OTAs then built a highly profitable relationship with search engines. Now, both search and OTAs are being challenged by AI assistants.

For the first time, a single interface may accompany travelers throughout the entire journey: from discovery, to consideration, to transaction. Unlike previous interfaces, it is conversational and no longer tied to a website, an app, or even a screen.

For hotels, this represents both a risk and an opportunity. The question is no longer whether AI will participate in the travel funnel. It is how much of the funnel it will eventually own.

DISCOVERY IS BEING COMPRESSED

AI assistants have dramatically reduced the effort required to discover travel options.

What once required multiple searches, websites, reviews, and comparisons can now begin inside a single conversation. Travelers can explore destinations, compare neighborhoods, and build shortlists in minutes.

This does not mean traditional search disappears overnight. Most travelers still turn to search engines, OTAs, or hotel websites when making serious decisions.

But that is precisely the point. AI assistants have already proven they can handle discovery. If they gain access to structured hotel data, availability, rates, policies, and booking capabilities, travelers will have fewer reasons to leave the conversation.

And once discovery is compressed, the next logical step is consideration.

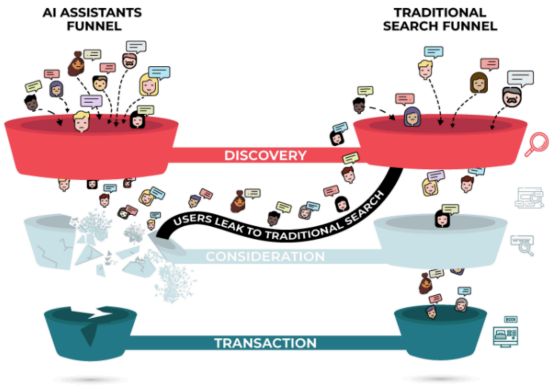
THE ECONOMICS OF DISCOVERY ARE CHANGING, TOO

For more than two decades, discovery was not simply a stage in the travel funnel. It was an entire economy.

Search engines, OTAs, metasearch platforms, and hotel brands invested heavily in visibility because discovery generated attention and attention generated revenue.

AI assistants are beginning to challenge that model. As travelers increasingly discover destinations and hotels through conversational interfaces, some traffic historically generated during discovery may never reach traditional search engines or websites.

Yet today's AI funnel remains incomplete. Many travelers discover through AI but still return elsewhere to compare options, validate information, or make a booking decision.



Discovery is increasingly occurring within AI assistants, while consideration still largely occurs elsewhere. That is about to change.

BUILDING THE CONSIDERATION LAYER

Discovery and consideration are often treated as part of the same journey. In reality, they are very different problems. Discovery can tolerate approximations. Travelers looking for inspiration do not expect perfect answers.

Consideration is very different from discovery. This is where travelers compare hotels, evaluate trade-offs, and make decisions. They want exact information about cancellation policies, room categories, loyalty benefits, availability, and pricing. Consideration depends on accurate, structured, and up-to-date information.

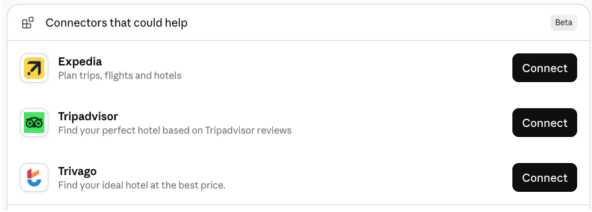
Historically, travelers found that information on hotel websites, OTAs, and review platforms. AI assistants could summarize it, but not reliably access it directly from the source.

That is beginning to change, and the solution may be a new piece in the hotel stack: AI connectors. They are tools and emerging standards that connect assistants directly to supplier systems, enabling them to retrieve information, answer questions, and eventually perform actions.

OpenAI, Anthropic, and Google are pursuing different approaches, but the objective is the same: helping travelers make decisions without leaving the conversation.

Another important trend is that assistants are increasingly moving towards automatic discovery of tools and connectors. Expecting users to manually find, install, and activate thousands of travel-related integrations is unlikely to scale. Instead, platforms are experimenting with ways for assistants to discover and invoke relevant capabilities when needed.

Different approaches are emerging, but the direction is similar: reducing friction between the traveler's question and the supplier's data or services.



If assistants succeed in solving consideration, they may become the first interface capable of accompanying travelers throughout the entire funnel up to the transaction stage. Agentic booking is the final step.

Remember that travel agents are not valuable because they list options and redirect customers elsewhere. They are valuable because they help a traveler decide and ultimately facilitate the reservation. AI travel agents will emerge soon, and the question will be whether travelers will feel comfortable using them.

FROM VISIBILITY TO REPRESENTATION

For most of the digital era, the challenge was visibility. If a hotel appeared in search results, the user clicked through to a website where the hotel controlled the presentation, comparison process, and transaction.

AI assistants introduce a different dynamic. Visibility still matters a lot. Hotels that are never mentioned cannot be chosen. But visibility alone is no longer enough. Hotels also need to be represented.

A traditional website is designed for humans. AI assistants need information they can understand, compare, and act upon programmatically. Room attributes, policies, amenities, rates, availability, and booking capabilities increasingly need to exist in structured formats.

Through connectors, APIs, and standards such as MCP, suppliers are beginning to expose not only content but also agentic capabilities directly to AI systems.

If consideration is solved inside AI assistants, we may be witnessing one of the biggest shifts in digital distribution since the arrival of search itself.

This does not mean hotel websites disappear. But their role may change. They may no longer be the default place where every traveler compares, asks questions, and resolves uncertainty. Part of that process may move into the assistant itself.

WHAT IS STILL MISSING

Much of the technology required to support AI-driven travel experiences is already emerging. Assistants are improving at discovery. Structured data is improving consideration. Transactional and agentic capabilities are emerging.

What remains unclear is the economic model that will sustain this ecosystem. Search succeeded not only because it offered a better interface, but also because it created a marketplace that aligned users, suppliers, and platforms.

The AI ecosystem has not reached that stage yet. This challenge goes beyond advertising. It also extends to representation. How will visibility be monetized? How will suppliers participate in recommendation and representation? A sustainable economic model will eventually emerge. Technology is being built, but the marketplace is still being designed.

THE ADOPTION GAP

Even if the technology and the economic model emerge, adoption will not be immediate or uniform.

Travel is a high-stakes purchase. Travelers may use AI assistants for inspiration, shortlisting, and comparison long before they fully trust them to complete a booking. Many will still want to validate photos, reviews, policies, and prices before committing. For many travelers, planning is part of the experience.

There is also an unresolved question of responsibility. When a reservation fails, a flight is canceled, or a traveler needs support during the trip, who owns the problem? Until that is clear, many users will remain cautious about delegating the entire journey to an assistant.

Hotels will face their own friction. Many still operate with fragmented systems, inconsistent data, and manual processes. For them, AI distribution will not simply be another marketing channel. It will require operational readiness.

This does not change the direction of travel. But it does mean the transition will be uneven. Some use cases, segments, and hotels will move faster than others.

WHAT HOTELS SHOULD DO NOW?

The greatest mistake hotels can make is waiting for certainty. And, unfortunately, many are in that position. It is true that no one knows which standards, platforms, or business models will dominate. But the capabilities required to participate are already becoming clear.

Hotels need to centralize their knowledge, structure it so AI systems can consume it at scale, and expose operational capabilities as machine-accessible tools.

Availability checks, quotations, reservations, cancellations, modifications, loyalty validation, and guest services increasingly need to be accessible programmatically. Hotels have to move all their core competencies to agentic capabilities.

Hotels should also think beyond direct integrations. Much as online distribution evolved through aggregators and technology platforms, AI distribution is likely to develop similar layers.

This may not look like an urgent revenue project today. For many hotels, proving short-term ROI will be difficult. But that is exactly why it should be treated as strategic infrastructure rather than campaign investment.

Most hotels built websites, booking engines, SEO capabilities, and connectivity because the internet changed the distribution landscape. Many reacted late, giving OTAs room to grow and strengthen their position. AI distribution may follow the same pattern, and hotels should not give OTAs the same advantage again.

CONCLUSION

Travelers will continue to discover, evaluate, and book. The funnel itself is not changing. What is changing is the interface through which those decisions happen.

Discovery is already moving into AI assistants. The consideration layer is now being built, and that may trigger transactions to eventually follow.

The question is no longer whether AI will influence the funnel. It is whether they will be ready to participate in the decisions that happen inside it. After all, isn't that what travel agents have always done?

HYB

The 30% Distribution Tax: Market Power in Agentic Commerce

Pre-Stay

Fredrik Sjoberg
Adjunct Professor at New York University Tisch Center of Hospitality. Founder & CEO, Maison Labs

MAISON

Fredrik Sjoberg draws a sharp historical line from the 10% commission of the travel agent era to the 15–25% of OTAs, and asks whether the AI agent era will push that number to 30% — the rate Apple held in the App Store for over a decade simply because it controlled the front door. The industry, he argues, is making the same structural mistakes it made with OTAs, and has a narrow window to act before the terms are set for good.

How we book travel is about to change fundamentally. We have gone from human travel agents in the pre-internet era to OTAs in the search era to AI agents booking in the years ahead. The question on any hotel owner's mind is how agent bookings will affect total distribution costs. To lament the dominance of OTAs is one thing, but what if distribution costs rise in the AI era? What if the platform take rate ends up at 30% by 2030? After all, that is the going rate in the most successful digital marketplace ever built.

Distribution has never been free, and its price has climbed with each new intermediary. In the analog era, the commission was about 10%, the standard rate an agent earned on a hotel booking or an airline ticket before the mid-1990s (GAO, 2003). When online travel agencies replaced traditional travel agents, the rate rose to 15%-25%, and a single company, Booking Holdings, held roughly 71% of the European OTA market by 2021 (HOTREC, 2022). The broad pattern is disturbing: the closer an intermediary gets to demand formation, the greater its pricing power.

Each is captured more by sitting closer to the moment of decision, from the human agent who advised, to the platform that ranked, to the software that will soon choose. Agents are likely to win a meaningful share of discovery, especially for transient travelers. A traveler today juggles OTAs, brand sites, metasearch, loyalty schemes, and review platforms to plan a single trip.

A consumer AI agent, like ChatGPT or Claude, knows its user's preferences, compares the entire journey, and books it end-to-end with almost no usual friction. Whoever owns discovery owns the economics. The agent becomes the point of first contact for the whole trip, and that is where the tax will be collected, one way or another.

Booking a trip carries friction in several forms: finding that an option exists, comparing options, entering your details, paying, and trusting that the room will match its photos. Every intermediary in the history of travel has earned its margin by taking some of that friction off the traveler, and an AI agent is the first that can take care of all of it in one pass. That is what makes it genuinely useful. The unsettled question is who keeps that value: the traveler, the hotel, or the agent provider that now sits where the friction used to be.

To see where the rate could land, let us look at the mobile app economy. Apple's App Store has taken up to 30% of in-app purchases since it opened in 2008. The fee was held for over a decade for one reason: a developer who wanted to reach an iPhone user had no second door. One storefront, one payment system, one set of rules, and the platform set the price.

Regulators and courts in the United States only began forcing that door open in 2025, after years of litigation and a market that had long since organized itself around 30% (Reuters, 2025). Apple later cut fees for some categories and smaller developers, but 30% remained the headline rate. That is how a gatekeeper behaves. It can afford to be generous at the margins while holding the line where the money actually is. The App Store is not a perfect parallel, as online travel is its own market. The point of the analogy is that whenever a new way of interacting on the internet emerges, the actor who controls the front door tends to exploit the market power conferred by it, much as economic theory predicts (Rochet and Tirole, 2003; Edelman and Wright, 2015).

A consumer AI provider with full booking capability could become the default way people plan and book and would sit at that chokepoint, owning discovery, comparison, and the transaction in one place. A hotel that wanted to be recommended would be back to buying placement, now from a single gatekeeper rather than several competing ones. The agent could set its take rate as Apple does in the App Store, and a hotel would have little leverage to refuse, because refusing would mean being invisible in the one channel where guests now look. The fee can surface as sponsored rankings, preferred-agent access, transaction processing, conversion optimization, or bundled placement. The AI advertising market is only now forming, so the shape the charge takes is unclear, but the temptation to maximize the value extracted is certainly there.

The strategic question is less about whether the agent works than who controls the interface once it does. An intermediary that controls access between two sides of a market, travelers on one side and hotels on the other, can price that access at a level set by its dominance rather than by its costs. The more of the traveler's daily life the agent already owns, through the device in their hand and the payment behind it, the harder it becomes for a rival to undercut it, and the more the charge starts to behave like a private tax rather than a competitive fee. Whether we get a 10% world or a 30% world depends on how concentrated the agent layer becomes. Concentration is also the default outcome rather than the exception, because the same network effects that make one agent useful enough to adopt make it expensive for a competitor to pull travelers away once they have settled in.

The force pushing in the other direction is competition, and it is the only thing that drives cheaper distribution. The price of a service falls toward its cost of production when several sellers compete for the same buyer. For agents, three things have to be true at once.

1. Travelers have to use more than one agent, or be ready to switch, so that no single agent is anyone's only route to a booking.

2. Switching has to stay cheap so a traveler can move to a rival without losing their history, preferences, or earned benefits.

3. New agents must be able to enter, which depends on securing hotel supply on the same terms as the incumbent.

Where all three hold, a handful of agents will push the fee down toward the cost of a credit card fee, and an agent asking 30% simply loses the traveler to one asking 5%.

Take any of the three away, and the market tips toward a single winner, free to set its own fee. The technology is the same in both futures; the price is set by the market structure we let form around it. It is inevitable. The 30% that Apple kept was the product of a particular market structure, and that structure is being unwound in court precisely because it was a choice rather than a law of nature. The foundations of agentic commerce are still being built, so its terms remain open. A handful of decisions taken in the next few years will determine whether hospitality inherits the 10% world, perhaps through a credit card fee, or the 30% one.

Hotel owners and brands hold the first lever. The mistake of the search era was to surrender both the inventory and the guest relationship to the OTAs and then complain about the cut they ended up taking, once well established. The discipline this time is to connect to many agents, on terms the hotel can read and reproduce, and to keep the guest record under the property's control rather than the platform's. A hotel reachable by every agent has more leverage than one dependent on a single closed pipe.

Technology vendors hold the second lever. Whether agentic booking runs on open, shared standards or on closed, proprietary pipes is being settled now through engineering choices that look mundane but are anything but. A common, public way for any agent to read a hotel's rates and availability is the difference between a competitive market of agents and a single gatekeeper. The industry has the leverage to insist on that openness while the layer is still forming, and very little leverage to claw it back once it has set.

Governments and industry associations hold the third lever. Europe already treats Booking as a gatekeeper subject to rules on rate parity and self-preferencing. The same posture, applied early to emerging consumer AI providers, would avoid the worst-case scenario. The associations that fought OTA parity clauses for a decade already know this fight. It is the same one, arriving sooner and with higher stakes.

For an individual hotel, the practical work starts before any of that is settled. Embrace direct, real-time connectivity so that any agent can transact without a toll-taker in the middle. Keep the property legible to a machine and treat dependence on a single agent as the risk it plainly is, the same risk a generation of operators learned to regret one channel too late.

The AI travel agent is coming, and for the guest, it will be a relief, one capable helper in place of a dozen open tabs. For hotels, the technology opens new paths to be discovered. Instead of the static, preset search filters of the OTA era, an agent can match a property to the actual intent behind a trip, favoring operators who keep their data clean and up to date. Whether the total distribution fee ends up in single digits or closer to 30% remains unsettled, and it depends on the choices owners, vendors, and other stakeholders make over the next few years. The last time the industry waited to find out, it learned the fee's magnitude only after it had lost the leverage to change it. The cost of acting early is a few uncomfortable conversations about standards and dependence. The cost of acting late is a recurring distribution tax embedded in every future P&L.

REFERENCES

Edelman, B. and Wright, J. (2015) Price Coherence and Excessive Intermediation. Quarterly Journal of Economics, 130(3), pp. 1283–1328.

GAO (2003) Airline Ticketing: Impact of Changes in the Airline Ticket Distribution Industry. GAO-03-749. Washington, DC: US General Accounting Office. Available at: https://www.gao.gov/products/gao-03-749 (accessed 31 May 2026).

HOTREC (2022) European Hotel Distribution Study 2022. Brussels: HOTREC. Available at: https://www.hotrec.eu/ (accessed 31 May 2026).

Reuters (2025) Apple ordered to stop charging commission on App Store external purchases. Available at: https://www.reuters.com/ (accessed 31 May 2026).

Rochet, J.-C. and Tirole, J. (2003) Platform Competition in Two-Sided Markets. Journal of the European Economic Association, 1(4), pp. 990–1029.

HYB

The Future of Distribution Isn’t Passive Connectivity. It’s Agentic Execution.

Pre-Stay

Sankar Narayan
CEO and Managing Director, SiteMinder

Sankar Narayan argues that connectivity alone is no longer enough to solve hospitality's revenue problem. The real gap, he says, is execution. With 45% of hoteliers identifying revenue opportunities every week they cannot act on in time, and nearly four in five spending over 11 hours on manual tasks that should be automated, he makes the case that the industry's next competitive frontier is not smarter insights, but faster action.

For the past twenty years, the hotel industry has sought to address the fragmentation that's grown alongside the introduction of new tools into the tech stack.

The answer: connectivity.

APIs have replaced manual contracting.

Distribution has shifted from static to real-time.

And, applications, from those providing revenue management to guest engagement, payments, business intelligence and every capability in between, have all become increasingly integrated.

Yet despite this progress, hoteliers today continue to miss critical opportunities to generate the revenue their businesses need.

Not because they lack the data. Even a 100-room hotel with 1.5 guests per room and 65% occupancy has data on more than 35,000 guests every year.

Not because their systems can't communicate, as connectivity has made sure they can.

But because acting on what they know still requires too much manual effort, coordination and time.

The challenge facing hospitality, therefore, is no longer connectivity alone. It's execution.

THE HIDDEN COSTS OF CONNECTIVITY WITHOUT ACTION

A recent study of 700 hoteliers worldwide finds that 45% identify revenue opportunities every week that they can't act on in time.

One example of these opportunities is distribution channels that hotels are yet to connect to, even as new source markets emerge. Another could be times when occupancy is running hot for a hotel while its rates remain too low. Or they could be failures because properties do not appear in AI-powered search results.

Whatever the opportunities may be, they aren't being identified occasionally or during peak seasons.

Hoteliers are identifying missed revenue opportunities every week.

Just as concerning, nearly four-in-five hotel teams (79%) are spending more than 11 hours every week on manual tasks that could be automated between systems. This bridging work is the hidden cost of a tech stack that isn't yet truly integrated.

It's not just costing hotels time, either. It's costing potential sales and revenue.

At least one in two hoteliers (58%) have foregone adding a distribution channel that they actually wanted their property to be on. Not because the channel wasn't right for them, or that connectivity wasn't technically possible, but because the setup was too complex and time-consuming. Their team simply couldn't absorb it.

THE NEED FOR LIGHTNING SPEED-TO-MARKET

At a time when LLMs can process immeasurable volumes of data in seconds, connecting to a new distribution channel should be an easily executable decision, not a weeks-long project.

It's clear that hoteliers remain paralysed by technology that can't keep pace with the speed they need. And herein lies the opportunity.

The same study found that 65% of hoteliers expect that the ability to take immediate action in response to demand changes would unlock at least 6% more revenue each year. Across the $1.2 trillion global accommodation sector, this opportunity represents billions of dollars in potential revenue.

As technologists, it is on us to address this billion-dollar pain point, and that means enabling speed of execution.

Not merely integrating.

Not merely capturing data and surfacing insights and recommendations.

But enabling execution of all the above, at speed.

It's this capability that makes the language of "connected" no longer enough.

LOOKING BEYOND ASSISTANCE, TO EXECUTION

As with many industries, we are witnessing AI reshaping how hoteliers work. As for what the future holds, I believe we can expect more agentic workflows to operate seamlessly across connected hospitality platforms.

And that's exciting.

A future where agents no longer work in silos and, instead, sync with each other on behalf of the hotels they support.

A future where hoteliers feel empowered to make rapid decisions, based on contextualised recommendations, and then act on them just as quickly.

It's a future where distribution doesn't end after the point of connection. Instead, distribution becomes the new, dynamic form of revenue management – an ongoing journey of connectivity, rates and content management, intelligence analysis and rapid execution, moving at the pace the AI era demands.

While the rate of adoption could, of course, be faster, I am encouraged to see many hotels moving away from disconnected workflows toward more integrated operating environments.

It's no secret that hoteliers want to manage fewer systems and enjoy more native workflows. They want capabilities such as distribution, intelligence, pricing, and other revenue-performance workflows within the core environment they operate in.

In this way, what is becoming as valuable as the source of truth itself is the execution system.

We're operating at a time when AI assistants are exploding. Using these, hoteliers can now be guided on performing tasks such as interpreting data, distributing inventory and establishing the right channel mix.

But while AI assistants are a major leap forward for the hotel industry, they are only as good as their ability to perform the tasks required.

Suggestions are great, but can they open or close a hotel's availability, or update room rates? Can they adjust restrictions, select distribution channels, respond to demand patterns and optimise commercial workflows?

In short, they can't. Only a system of execution can turn intelligence into action, demand into bookings, and potential into performance.

Whether bookings are looking rosy or s#!t is hitting the fan, hoteliers need the ability to act quickly.

FROM SINGLE SYSTEMS TO ENTIRE ECOSYSTEMS

The key to unlocking this future capability lies in APIs.

Over the last two decades, we have seen the travel industry move from manual contracting to API-first distribution.

It's a movement underpinned by a less visible shift: from system-to-system to ecosystem-to-ecosystem.

The future of distribution will see PMSs, RMSs, CRSs, CRMs, payment systems, guest applications and business intelligence all interacting underneath AI layers, enabled by a unified view of data.

Put another way, the future will see the rise of agent-to-agent conversations, turning manual processes into automated ones.

Why? Because the complexity of distribution has never been greater. AI has created new opportunities for hotels to gain visibility, but these opportunities mean hoteliers must make faster decisions.

The agentic future of distribution makes it possible to work at speed.

IT COMES BACK TO ACCESS AND CHOICE

Without doubt, system silos have been one of the biggest barriers to hotels making material changes.

But we've arrived at an inflexion point where connecting siloed systems is no longer adequate.

The opportunity ahead lies in helping hotels execute with a deeply unified commercial tech stack in which distribution, intelligence, and revenue optimisation work together in real time.

As an industry, I believe we should welcome the agentic future of distribution. Not only will it further democratise technology for hotels, but it will also increase every hotel's speed-to-market, making it simpler for those hotels to generate the revenue they need.

Because even if hotels aren't seeking out this future, their guests are. SiteMinder's Changing Traveller Report 2026 reveals that four in five travellers now want AI assistance at one point during their booking journey. Additionally, consumers are now using AI to search for places to stay nearly four times more often than they did in 2025.

These numbers are only set to grow.

In the future, it will be the hotels with accurate, rich and accessible data that tomorrow's guest will find.

History shows us that major events will increasingly drive booking decisions. Emerging markets will open new revenue potential. Geopolitical forces will continue to accelerate the pace of change.

As for how these will manifest, we can expect a demand signal to become a distribution decision. A performance dip will soon become a pricing adjustment. A traveller's question will culminate in a booking.

This is the future of distribution, where connectivity has shifted from an ideal to a requirement, and speed of execution is the new commercial advantage.

HYB

Anticipatory Markets: Where Revenue Management Meets the Traveler's Journey

Pre-Stay

Klaus Kohlmayr
Chief Evangelist and Development Officer, IDeaS

IDeaS
A SAS COMPANY

Klaus Kohlmayr argues that revenue management is undergoing a structural shift from reactive optimization to anticipatory intelligence — where pricing decisions are no longer based on historical extrapolation but on probabilistic futures and real-time guest intent signals. In a world where AI assistants increasingly mediate booking decisions, the hotels that act earlier with better data will outperform those waiting for demand to declare itself.

"Uncertainty" has always been a defining characteristic of business strategy, never more than today in an era awash in data required to make timely and impactful decisions. Hotel leaders can no longer afford to rely on reactive strategies to remain successful amid volatile market conditions, as booking windows compress and consumer booking decisions fluctuate alongside external factors. Today, understanding guest intent and nuanced signals is essential to outperforming reactive models dependent on historical data and traditional strategic assumptions.

The good news is that hoteliers now also have expanded toolsets to manage uncertainty and even transform it into a potential competitive edge. New technologies, data analytics, and machine learning principles are available to help hoteliers better anticipate shifts in demand and market dynamics. Today's technology investments mark the emergence of anticipatory markets in hotel booking forecasts, where decisions are shaped by probability, and the freshest information wins.

From the travelers' perspective, anticipatory intelligence is most applicable during the pre-stay phase. Here, bookings and packages can be influenced by data analytics, adjusting prices and timing based on consumers' historical decision-making relative to current occupancy and average daily rate (ADR). By understanding how guest segments interact with the booking path today, hoteliers can begin to leverage guest intent and optimize profitability.

REDEFINING PRE-STAY: WHEN THE JOURNEY BEGINS BEFORE INTENT

Hotels have typically viewed the pre-stay period as part of the hotel booking funnel, but today it has far broader applications. Think of it as a system state from which hotel technology can make decisions, interact with consumers, and adjust strategic actions accordingly. With the right integrations and partners in place, the pre-stay period can become your property's most profitable revenue opportunity.

Pre-stay strategically used to consist of finding ways to influence search results, provide the best possible rates for comparison shopping, and offer a simple booking process to convert consumer queries into revenue. These aspects are still important.

However, discovery increasingly occurs in AI-mediated, heavily curated environments, leading some to even announce that the traditional funnel is "collapsing". These can include generative search programs, AI assistance, or zero-click context prompts provided through search engines.

Consumers enjoy using LLMs thanks to their simple interfaces, which positively reinforce questions by providing additional information that increases their confidence in each purchase. An LLM's ability to go off on information-rich tangents can provide ideal marketing opportunities for hotels, as guests clearly communicate their expectations through conversations with AI assistants, which in turn can be observed and analyzed.

Working backward, providing the ideal price to these consumers becomes the core factor driving each conversion, which naturally occurs during each conversation with an AI assistant. Hotel leaders can therefore leverage guest intent before they consciously articulate intent, becoming a part of the conversation users were already having.

PREDICTIVE PRICING AS THE FIRST EXPRESSION OF ANTICIPATORY INTELLIGENCE

Traditional revenue management extrapolates from past data, creating a historical context for future decisions. Today's markets no longer play by the same rules. Actions from outside the industry, the local market, and more all influence guest booking decisions today. Thanks to the proliferation of information through the internet and AI assistants, competition for the best possible rate is at an all-time high. As such, hotels need a stronger forecasting model to reliably operate today.

Predictive pricing is the latest wave of innovation driving revenue management success today, as it considers probabilistic futures and weighs multiple possible demand outcomes before setting an optimal room rate. In practice, hotels can continuously evaluate many potential options. When one single forecast won't do, hotels can now keep going back to the drawing board until the moment guests place a booking.

Needless to say, these kinds of calculations cannot be performed manually. No single person – or team – can factor in all available data to arrive at an accurate pricing prediction. When pricing is less about optimization at a single moment in time and more about preparedness across possible futures, automation becomes a necessity. Revenue management systems today are no longer just about finding the right pricing strategy, but also about striking the right balance between price and inventory optimization.

These trends mark a structural and cultural shift in hotel revenue strategy, as revenue systems become anticipatory decision-making environments rather than reaction engines. As shoppers become increasingly willing to tell AI agents explicitly what experiences they desire, across a range of prices, these offers will become increasingly targeted and value-driven.

For example, travelers searching for a pet-friendly boutique hotel somewhere on the beach, located within a four-hour flight, but not more than 200.00 each night, know what they are looking for. These guests are less price-sensitive when presented with an exact match to their query than when presented with a hotel option that only meets part of the criteria.

PRICE AS SIGNAL: HOW ANTICIPATION SHAPES GUEST PERCEPTION

Price is the ultimate deciding factor behind all guest bookings. The price of a guestroom communicates meaning, value, and intention behind a hotel long before a guest arrives. Room rates have a tremendous impact on guest expectations and satisfaction, and the higher the rate, the more it signals scarcity, confidence, expectations, and timing.

In anticipatory markets, pricing subtly shapes guest behavior and perception. Hotels can use data from these signals to influence marketing and pricing decisions over time. More importantly, pre-stay pricing can be used to set emotional and cognitive anchors that connect travelers to the stay experience. Guests react differently to a fantastic deal compared to a once-a-year splurge, and hotels must be prepared to fully accommodate both mentalities.

Pricing is one of the earliest experiential touchpoints in the journey, and hoteliers continue to learn more about travelers by observing how they react to shifts in price points. Hotels must continue to leverage technology to understand guest expectations and deliver the best possible service, particularly regarding the perceived value of their properties. The first step is to understand your hotel's value and what it means to each guest at the start of each stay.

FROM CONTROL TO GOVERNANCE: THE EVOLVING ROLE OF HUMANS

While technology is increasingly entrusted to tackle the day-to-day monitoring, adjusting and implementation of pricing strategies—to the point where excessive manual tinkering can quickly become a detriment—that doesn't mean humans are any less important for the success of these tools.

The reality of today's hotel revenue management strategy is that humans no longer actively "set prices" at the property level. Instead, operators set strategies with parameters defining each hotel's objectives, operational constraints, available risk tolerance, and necessary ethical boundaries. This allows hotel leaders to manage a broad operations strategy without getting bogged down in the minutiae of daily rate adjustments.

When automation takes control of something as mission-critical as daily rates, forming trust between operators and their tools becomes central. As author and tech philosopher Simone Puorto said, it's not enough to simply keep humans on as part of your team if they are used to solving a problem already addressed by modern technology.

THE COMPETITIVE ADVANTAGE OF ACTING EARLIER—NOT LOUDER

Innovations that accelerate automation, directed by engaged humans, can help hotels act earlier when setting rates, forecasting bookings, and reaching out to customers. In volatile markets like today's, timing is everything.

Moreover, by focusing their efforts on anticipatory pricing, hotels can align their revenue, distribution, and inventory strategically before bookings even come in. This allows hotels to optimize operational costs and right-size staffing to meet guest demands. Meanwhile, hotels that lack the data to capitalize on these interactions will struggle to meet these same criteria as booking windows continue to compress.

With market uncertainty a constant force to contend with, hotels should establish greater organizational readiness to respond to changes in guest demand and occupancy at a moment's notice. The best way to achieve this is through a sophisticated data strategy supported by strong technology partners who understand the value of looking beyond traditional hospitality key performance indicators to identify additional revenue-generating opportunities.

LOOKING BEYOND PRE-STAY: ANTICIPATION AS A CONTINUOUS LOOP

Valuable data generated by guest *intent* does not end after a room is booked. Today's booking environment can serve as a jumping-off point for additional experiences once guests are on property, supported by ongoing communication. Furthermore, pre-stay pricing sets specific expectations about the guest experience, can influence travelers' in-stay behaviors, and can serve as framing for post-stay memories and feedback for the hotel.

Today's operators are taking steps to ensure that every aspect of this process is under consideration, shaping priorities for each guest in advance of their arrival. In practice, predictive pricing serves as the first visible surface of a wide-reaching analytical system that influences the entire guest journey. This includes understanding the context of each booking in relation to the current price, a guest's past booking history, and other specific preferences.

When hotels have access to this data, they can take a more active, intentional role in shaping the guest experience.

PRICING THE FUTURE WITHOUT CLAIMING TO KNOW IT

Data and guest intentions may appear uncertain, but they are far from uncharted or shapeless. Hotels have the technology today to predict emerging trends in real time and make informed decisions using anticipatory revenue strategies. These tools don't eliminate uncertainty but instead allow operators to act wisely under unfamiliar conditions, providing a strong foundation for delivering the best possible guest experience.

In a sense, predictive pricing becomes not just about revenue but equally about readiness for what comes next. It provides hotel operators with the highest-quality information available, so guests can have the stay they envisioned when they first booked. And hotel operators can turn uncertainty into profit.

HYB

Demand Without Friction: Automating Hotel Sales

Pre-Stay

Daniel Melnyk
Founder and CEO, Parclane

Parclane

Daniel Melnyk makes the case that group and MICE sales is the single most underserved corner of the hotel when it comes to AI — and the one with the highest potential return. The opportunity, he argues, is not in blasting meeting planners with machine-written outreach, but in using a hotel's own first-party data to prospect intelligently, consistently, and in the seller's voice, without adding to an already overloaded workday.

The most personal sale a hotel makes is group/MICE business.

These sales run on relationships built over years, where a meeting planner trusts your hotel and sales team. For many properties, group or business events represent some of the most valuable business. Group base provides a revenue foundation to yield and build from. The booking window puts business on the books years in advance.

A dollar spent on group sales capability today doesn't necessarily pay back this quarter, but it seeds a pipeline that actualizes in 2027, 2028, and beyond.

When we think about generating group business, sales leaders typically envision direct outreach from sellers to buyers. Enabled by technology, this leads us to conclude that more outreach can be deployed faster to more people. As marketing technologies advanced over the past decade, we've proven the value of templates firing on a schedule.

In a business that lives and dies on relationships with a small, tight community of meeting planners and third-party intermediaries, that picture can become the very thing sales leaders are right to fear. An inbox full of obviously machine-written sales emails doesn't win a professional meeting planner. It can negatively impact the trust that took years to build. When a sales leader hesitates on "AI for prospecting," they're being mindful of their assets.

The opportunity I want to talk about is the opposite of the thing we're afraid of. It lives in the hotel sales office. It serves the hotel sales team, which in turn serves the asset owner. It may be the highest-value and most underserved corner of the building when it comes to AI.

What problem are we trying to solve? AI is so big and can be so transformational that the decision fatigue or bigness can be overwhelming. The potential is enormous. My experience gives a clean north star. Hotel sales teams exist to book group business. Hotel sales teams don't have the time or tools to prospect meaningfully, efficiently, or consistently.

The question becomes how to point AI directly at that problem. The ingredients — the hotel sales team, the rich data hotels already own, and the technology available — are already mise en place. There are many approaches that can be considered, but the thoughtful-yet-impactful one is to look at what parts of a Sales Manager's job can be augmented or enhanced by AI, while also considering the necessary human element of group and catering sales.

Ultimately, prospecting is what sets the top-producing sales teams apart.

WHERE IS AI IN HOTEL SALES TEAMS TODAY?

It sits in at least five different places, and they are not interchangeable. IT leadership may already understand these inherently, but naming them makes it possible for the conversation between sales leadership and other stakeholders to take place.

It began with basic automation and lead management. This solved the age-old problem of inbound lead management and relied on rule-based routing, CRM workflows, and templated RFP responses. Incremental gains in labor savings were made, but realistically, the generic nature of automation acting on processes didn't meaningfully impact group revenue. It gave time back to Sales Coordinators and Sales Managers, and ensured that first-party data was being accurately captured and retained.

Shadow AI tool usage. General-purpose large language models, such as ChatGPT, that hotel Sales Managers are using on their own for client-facing emails or RFP responses. They reach for it because they use it in their daily lives. Some of this generative AI capability is making its way into B2B lead, RFP, or marketing platforms serving our industry, offering marginal time savings.

Agentic AI as an analyst. Hotel companies are deploying AI agents to stitch data across various sales systems to produce reporting, run analysis, and answer business questions that used to require a legacy BI tool or a heroic run in Excel. In practical terms, it's now offering real intelligence and telling sales leaders about the business they already have. They're able to rapidly query the data, sometimes using plain language inputs, democratizing access to answers to inform strategies.

When AI becomes revenue-generating, not just cost-efficient. The same family of technology described above, but enhanced to be biased towards action, not just understanding and articulation. The activation of the learnings, particularly when paired with an outbound sales approach to proactive meeting planner engagement, is where AI begins to work the hotel's first-party data to generate group sales pipeline. Done well, this hands sellers time back and generates new business in real time using your existing data.

A bright future is where rich input and deep learning predict and work proactively to contract group business. This is a utopian, yet very close state where learning signals actually predict a meeting planner's intent to source, enabling a hotel Sales Manager to act early enough that your hotel leads the conversation before the opportunity ever reaches the open market. What is truly meaningful is that AI's ability to understand and predict future group demand, based on the richness of the planner interactions' inputs, makes this truly transformational for group sales.

POINTED AT THE RIGHT PROBLEM

Automation is not intelligence, but it did offer an early solution. It provided volume and consistency, which are difficult to achieve from human sales teams, considering the average hotel Sales Manager's day.

Group sales is the single best place in a hotel for AI to generate substantial revenue impact, not just cost savings through labor efficiency. It has made the leap from rule-based to being genuinely personal precisely because of the data. A rule-based system has no way to use the years of first-party history sitting in your sales & catering system. Real AI can read it and give meaningful clarity to who booked what, when, around which event, at what rate, with which preferences, and which patterns of behavior — enabling personalization at the level a strong seller would, but at a scale no seller could.

There are two parts: understanding and then activation. In understanding, the AI reads the first-party data the hotel already owns that's held across multiple silos. This data, without action, becomes a beautiful painting hung in a museum that nobody visits.

The activation is where the revenue is generated by meeting the planner where they are — in their inbox. Prospecting via email, grounded in the hotel's own data, sent in the seller's real voice, at a sensible time, to someone who has a genuine reason to contact, is the holy grail of hospitality sales. AI enables this to run continuously in the background.

With the understanding granted through the use of AI, why would a seller not activate and send those emails themselves? Why would a hotel consider an AI solution for this? It's simple: time. Hotel sales leaders understand prospecting must be done during available hours, and the makeup of a seller's day often prevents or delays this from happening. Using an AI solution ensures that the consistency of business development happens. It's insurance for your pipeline.

There's a reason this version survives where so much group sales technology became shelfware, and it isn't just the model; it's the architecture. The failure mode of tools for sales teams has always been adoption, because a tool that asks the seller to change how they work, adds one more login, adds one more action item to a day that's already on fire, won't get used. The version that holds up runs itself. AI does the prospecting in the background, inside the workflow that the seller already lives in. That makes it sustainable.

The seller doesn't start their day figuring out where to begin. They receive a pipeline that regenerates itself using AI. Their planner relationships are warmer because the outreach was better informed than their own manual prospecting may have been.

WHY AI FOR GROUP SALES? WHY NOW?

To justify AI investment in group sales, the delta is clear: generate new group business, bring down the cost of acquisition by activating dormant first-party data and leaning less on expensive sales channels. It has to produce revenue that an owner can bank on, and that's predictable enough to underwrite.

The operating environment sellers are working in makes the timing urgent. The American Hotel & Lodging Association reports that operating costs have risen at roughly four times the rate of revenue since 2019, with revenue growth projected to be modest for the year. In the association's own words, "it is considerably more expensive to own, operate, insure, and reinvest in a hotel today than at any other time in the last decade" (AHLA 2026). Demand hasn't collapsed, but it has become discerning. The U.S. Travel Association's 2026 group travel report, fittingly titled *Strength Beneath the Surface*, found underlying demand holding firm even as headline numbers softened — RFP volumes running above 2019 levels — with most business travelers expecting to travel more as a group this year and strong forward sentiment from planners (U.S. Travel Association 2026).

Hotels spend tens of thousands of dollars and more to participate in a single tradeshow, then let those contacts wither because they simply don't have time to work the list. The cost of acquisition isn't fixed. It's being managed poorly, partially because it's not well understood.

Herein lies the friction. Costs are growing faster than revenue, channels of business that pay off are costly forms of acquisition (or commission-based), owners are pushing for more group revenue at lower cost to optimize profitability, and the sales team's day has no room for prospecting in it.

Put those together, and the AI mandate writes itself. Owners need high-margin group revenue. CFOs need to hold the line on cost. The group demand is there. AI generates profitable group business without adding headcount. The average conversion value on a piece of group business is far larger than a single transient reservation. This value justifies the investment.

MY RECOMMENDATION

Start using AI to generate group revenue. Start with the first-party data your hotel already owns. That data set has been compounding year over year, in your favor, and it is your asset. You've already paid for it, so why not use it to the maximum benefit? We know the group booking window is what it is. Every quarter you delay addressing this becomes a sourcing cycle you can't get back.

REFERENCES

American Hotel & Lodging Association (2026), "2026 Policy Guide", available at: https://www.ahla.com/sites/default/files/2026-AHLA-Policy-Guide.pdf (accessed 28 May 2026).

U.S. Travel Association (2026), "U.S. Group Travel Report: Strength Beneath the Surface", available at: https://www.ustravel.org/sites/default/files/2026-04/US_Travel_Group_Travel_Report_2026.pdf (accessed 28 May 2026).

HYB

Your Hotel Has Forty Products. The Website Sells Five.

Pre-Stay

Markus Mueller
Managing Director, GauVendi

GauVendi

Markus Mueller argues that hospitality's real distribution problem has nothing to do with AI or personalization technology — it lies in an inventory model designed in the 1970s that collapses thirty or forty genuinely distinct room products into five website categories. Until hotels start selling real products instead of generic containers, he contends, no amount of sophisticated technology layered on top will deliver the experience guests actually want.

Walk into the back office of any 120-room hotel and ask the front office manager how many genuinely different rooms the property sells. Let them think for a moment. They will name the corner suite with the silent garden. The room above the bar that nobody loves on a Friday night. The two adjoining doubles that families fight over for every school break. The high floor with the rooftop view. The accessible room with the larger bathroom that couples quietly prefer. By the time the team finishes, you will have counted thirty or forty distinguishable products in their heads. Now look at the website. Five categories. Maybe six. The most differentiated, most expensive, most emotionally loaded asset in the entire business is being sold under labels that erase the things guests would actually pay for.

I have done this exercise with hoteliers in Hamburg, in Lisbon, in the Alps, in coastal Tuscany. The numbers vary. The pattern does not.

That is the real distribution problem of our industry, and it has been hiding in plain sight for thirty years. I have sat through more keynotes on personalisation, loyalty, AI agents, and immersive booking journeys than I care to count. Almost none touch the inventory model underneath. That model was designed in the 1970s for a green-screen terminal, and we are still living inside it. Until the foundation is rebuilt, no amount of new technology in the pre, mid, or post-stay layers will deliver the experience guests now expect.

The customer journey, when you strip away the conference jargon, has three moments that matter. The moment the guest decides. The moment the hotel actually delivers. The moment the memory forms and either pulls the guest back or quietly does not. All three are held back by the same inheritance. We are still selling ingredients in an industry that has been asked to deliver products.

WHERE THE GUEST DECIDES

It starts long before anyone walks into reception. The guest is typing into a metasearch box, scrolling through Instagram, asking a chatbot, or whispering a request to a voice assistant. None of them are searching for “a hotel in Paris” anymore. They are searching for something specific. Quiet. South-facing. A workspace with a real desk. A bath as well as a shower. Walking distance from a particular bakery. The questions are detailed, contextual, and often emotional.

Our standard answer to those questions remains a list of room categories that say almost nothing. A category is a container, originally invented so a property management system could organise housekeeping rotations and rate plans. It made inventory legible to back-office staff and to the first wave of online travel agencies. Over time we mistook the container for the product.

Our industry has been talking about a fix for almost a decade. Attribute-Based Selling, usually shortened to ABS, has dominated conference keynotes since at least 2017. The promise has always been straightforward: let guests filter for a higher floor, a quieter side, a walk-in shower, a morning balcony, rather than pick between Standard and Superior. The label gets richer. Mapping each unit’s real characteristics becomes visible inside the booking flow (Stegmayer, 2021). I have been on the optimistic side of that conversation the whole time.

What I have come to admit is that ABS has barely been built where it matters most. The chains that announced pilots in 2018 are still announcing pilots. Where ABS does show up in production, it is almost always bolted onto post-booking upselling. The guest is offered the chance to pay extra for a balcony or a higher floor after committing to a Standard Double. The point of sale itself, the moment that decides whether the guest books at all, still presents the same five tiles it presented twenty years ago. And even in its purest form, ABS stops at the ingredient. It describes the room. It does not yet design the product.

That sharpens the argument considerably. The hotels that move next will skip past the half-built ABS layer altogether and design real products at the moment of sale. Each physical unit becomes the source of multiple offerings, each defined by features that a real human values, each with its own narrative, its own price logic, and its own channel placement. Same ingredients, different products. The same room can become a quiet retreat for a writer on deadline, a compact city base for a midweek consultant, or, paired with the adjacent twin, a family reunion suite. Customers everywhere else in commerce buy products. Hospitality remains one of the very few categories that still asks them to buy ingredients.

There is a name for this approach now. Some of us have started calling it "Dynamic Inventory": the practice of treating each physical unit as the source of multiple bookable products, each with its own name, story, features, and price (Mueller, 2026). The first hotels operating this way already report measurable uplifts in direct conversion and in the share of reservations the system can complete without a human in the loop. This is not theory anymore.

McKinsey reports that 71% of consumers now expect personalised interactions, and 76% feel frustrated when they do not receive them (McKinsey & Company, 2023). Search engines and AI travel agents have something concrete to match against once products exist. A query for a hotel in Lisbon with a real workspace and a south-facing balcony then returns a real product, with a name, a story, and a price that reflects what those features are worth (GauVendi, 2025). Phocuswright finds that direct bookings continue to grow primarily for properties that give travellers a reason to switch (Phocuswright, 2024). A genuinely different product is a reason. A two-euro discount on the same shelf item is not.

WHERE THE HOTEL DELIVERS

What the website promised is either honoured or quietly broken between check-in and check-out. Every operator I speak to wants the moment of arrival to feel effortless and the stay itself to feel personal. Very few are set up to deliver it.

The reason is the inheritance again, this time wearing operational clothes. I have stopped finding it funny. When a hotel sells categories, it postpones the actual decision of which physical room a guest will receive. Assignment is made the morning of arrival, often by a tired front office team balancing occupancy, late check-outs, group movements, and engineering blocks. The guest who chose the property because of the courtyard view ends up in a street-facing room with double glazing that almost works. The guest who wanted the high floor is downstairs because the lift is being serviced. Operations did its best with the inventory model it inherited.

There is a more honest way to think about assignment. Treat it as a continuous job across the booking lifecycle, rather than a single event at check-in. Every new reservation should be allowed to trigger a reshuffle. Specific feature requests should be honoured before generic ones. The objective can shift between revenue, occupancy, and guest experience depending on what the property needs that week. None of this requires generative AI. It requires an operating system that treats inventory as fluid. I keep being told this is the hard part. In my experience the harder part is admitting the model we inherited has quietly become the bottleneck.

Orchestration has a second dimension. The mid-stay is also where the ingredients of an experience get assembled. A pillow menu, a late lunch, a yoga mat, an early breakfast, a quieter table at dinner. Each is a feature, with a value the guest will often pay for if asked at the right moment. Cornell research has shown for years that ancillary revenue per guest grows when offers are contextual rather than generic (Anderson, 2017). The technology already exists. The bottleneck, once again, is the underlying data model. If we have only ever sold categories, we have only ever known categories.

A property that captures feature-level signals turns itself into a learning system. By checkout, the hotel knows more about that traveller than the OTA does, and the knowledge belongs to the hotel.

WHERE THE MEMORY FORMS

Memory is selective. Guests forget the rate they paid within days of departure. They remember whether the experience matched the promise. Bain reports that emotionally engaged customers are between two and four times more valuable than merely satisfied ones (Bain & Company, 2022). A stay that delivered exactly what was sold, down to the feature, lodges in memory as a “right place at the right time” experience. A stay that fell short, even slightly, leaves a quiet reservation that surfaces the next time the guest is choosing where to go.

Loyalty, as a concept, has been over-engineered and under-delivered. Most programmes are discount mechanisms dressed in tier names. They reward frequency. They rarely reward fit. Anyone who has worked the front desk on a wet Tuesday in November knows the difference. The evidence is clear that emotional loyalty, the kind that drives unprompted recommendation, comes from feeling understood (Reichheld, Darnell and Burns, 2021). A guest who once booked the quiet garden room does not need a generic “we miss you” email twelve months later.

They need a note that says the same room is available next month, the new chef has added a vegetarian tasting menu, and the bakery they liked has just opened a second location around the corner. Re-engagement built on feature memory is more useful than re-engagement built on stay history alone.

Another quieter benefit. Every booking made against a feature-defined product produces a new class of data. It tells the hotel what was valued, by whom, in what context, and at what price. Categories destroy this signal because every guest is funnelled through the same label. Products preserve it. Over a year, an independent property accumulates buying intelligence that no chain headquarters or OTA can easily replicate. That dataset feeds the next round of product creation. Pricing sharpens. Marketing sharpens. The loop compounds.

CONCLUSION

The deciding, the delivering, and the remembering are usually treated as three separate disciplines, each with its own software, its own KPI, and its own conference track. They share a single foundation. If that foundation collapses dozens of unique units into a handful of categories, every downstream layer will struggle to feel personal, no matter how sophisticated the AI sitting on top of it.

Hospitality has always been an industry of detail. A particular light through a particular window in the late afternoon. A croissant from a specific oven. A welcome that lands because someone read the file. The technology stack we have used for three decades was never designed to honour those details. The technology stack we are now building can be. ABS opened the door. The next move is to walk through it and start designing real products.

I keep coming back to the same thought, and I will leave you with it. The room category was never the product. It was a workaround we forgot to replace. Once we admit that, the rest of the stack starts to make sense.

HYB

After the AI Hangover: What Happens to Hotel Photography?

Pre-Stay

Stefano Pinci
Professional Photographer, Stefano Pinci Photographer

STEFANO PINCI
PHOTOGRAPHER

Stefano Pinci writes from the photographer's perspective on what AI actually does — and does not do — to hotel imagery. The technology has become a genuine problem-solver in post-production, he argues, but its greatest risk is not bad output: it is the seductive pull toward a frictionless, anonymous visual average that makes every property look the same and none of them look real.

AI, HOTEL PHOTOGRAPHY, AND THE DIFFERENCE BETWEEN GENERATING IMAGES AND BUILDING A VISION

There is a sentence I hear more and more often: “With AI, you can do anything now.” Technically, that is almost true. Visually, it is only half true. And in hotel photography, it can even become dangerous.

Because a hotel photograph is not just a beautiful image. It is the first encounter between a guest and a place. It arrives before the booking, before check-in, before the real experience. It is a promise.

And a promise, if it works, must be desirable. But it must also be credible.

A room, a terrace, a lobby, or a restaurant must build expectation without betraying it. It must make people want to be there without inventing a place that does not exist. This is the fine line hotel photography has always walked: making a space stronger, clearer, more memorable, not more false.

AI is changing exactly that line.

Not because it replaces photography, but because it changes the way photography is conceived, produced, edited, and finalised.

REALITY HAS A TEXTURE

For years, generative AI occupied a separate territory: Midjourney, dedicated platforms, spectacular experiments, images that were often beautiful but somehow suspended. It worked very well when the goal was to create an imaginary world.

Hotel photography lives somewhere else.

Here, the marble has to look like that marble. The view has to be that view. The room has to remain recognisable. Light can be interpreted, of course, but it cannot lie too loudly.

The real shift came when tools such as Adobe Firefly and Generative Fill were integrated directly into Photoshop, becoming part of the photographer’s daily workflow. AI stopped being a special effect and became a concrete part of post-production.

But it is not magic. It is a tool for visual direction.

THE SET THAT WASN’T THERE

Anyone who photographs hotels knows this: often, the property is not truly ready to be photographed at its full potential.

Flowers are missing. Plants are missing. Styling is missing. Lifestyle details, small objects, and support from the F&B department. Sometimes, very little would be enough to change the perception of a space: a plant in the right corner, a tray, a book, a cup, a detail that lets the scene breathe.

Before, all of this was solved through realistic retouching: finding the right images, inserting them, adapting perspective, light, shadows, colour, and grain. It could be done. But it was slow, expensive, and not always convincing.

Today, I can select a precise area of a scene, type “indoor plant,” and, in a few seconds, obtain an element that is coherent with the space's light and mood.

Interestingly, generic prompts often work better than overly specific ones. If I ask for a Kentia palm, the result may look forced. If I simply ask for an indoor plant, AI sometimes finds a more natural solution, less literal, more right for the image.

It is a small lesson in method: the prompt should not prove how well we can describe. It should help the image find its balance.

THE SKY IS NOT ENOUGH

The most interesting leap, however, is no longer just about adding or removing objects.

The new frontier is AI’s ability to read the image as a whole: light, atmosphere, depth, volumes, and the relationship between space and perception.

Anyone who photographs hotels knows that the weather is not a detail; it is part of the production. Sometimes a shoot is brought forward, postponed, or completely rethought due to the weather, with all that entails for property availability, arrivals and departures, accessible rooms, and usable spaces. And quite often the opposite happens, too: a perfect sunny day is wasted because another logistical piece does not fall into place.

This happened to me recently in Rome, at a hotel with a beautiful swimming pool. The objective was very clear: aerial geometric shots, open umbrellas, empty pool, sharp light, clean shadows. After days of phone calls, planning, and weather checks, we finally found what looked like the right window. On paper, the sky was good. In reality, it was hazy. The blue was there, but the mood was not; the strong sun, the shadows, that visual tension the image needed were missing.

Replacing the sky in Photoshop has been possible for years. But a blue sky over a scene lit as if it were an overcast day is not credible. The sky changes, but the light remains wrong.

Today, AI can do something more sophisticated: it can rework the entire image as if it were truly bathed in bright, clear daylight. It not only changes the sky; it changes the quality of light, its direction, the contrast, the readability of volumes, and the presence of shadows.

It does not apply a filter. It rebuilds a mood.

SMALL SHOOTING DRAMAS

AI becomes truly interesting when it stops being a toy and becomes a problem solver.

A few years ago, at a hotel in Milan, I found myself facing one of those classic details that can ruin an image: carefully prepared rooms, good light, a ready composition, but beds with visible metal legs. I tried to recreate the missing bed bases using the generative tools available at the time, with the correct rooms as a reference. It worked, but with considerable effort: inconsistent results, perspectives to fix, details to correct.

Recently, something similar happened to me in Rome. Same problem, much more mature tools. With a clear reference and a well-calibrated prompt, the result arrived in a few minutes: coherent in style, credible in proportions, consistent from one image to the next.

THE RISK OF THE OVER-CORRECT IMAGE

The real problem with AI is not that it produces bad images. Often, it produces images that are almost too pleasant.

The risk is the average aesthetic: perfect light, perfect styling, perfect tables, perfect plants, perfect people. A visual world that is clean, polished, premium, but also anonymous.

It is the “AI look”: correct images, but without territory. Without friction. Without memory.

And in hotel photography, this is a serious issue. Because a boutique hotel in Rome, a seaside resort, a business hotel in Milan, and a historic residence cannot all speak the same visual language.

It is not enough to make them desirable. They must be recognisable. Distinct.

It is similar to what happened with WordPress templates: suddenly, everyone could have an elegant website. But many websites started to look the same. The difference was no longer the template; it was how the template was interpreted, modified, and bent around an identity.

With AI, something similar is happening. The tool democratises access to visual production, but it does not guarantee a point of view.

OUTPUT IS NOT OUTCOME

AI generates output. A lot of it. Fast. Spectacular.

But an output is not a finished image. And above all, it is not a vision.

The difference is still made by the eye: knowing what to remove, what to keep, where to push the light, and where to stop. Understanding when a scene is aspirational and when it becomes false. Understanding whether an image truly tells the story of a property or is simply following the average taste of the algorithm.

AI can generate infinite variations, but it does not know a hotel’s positioning. It does not know its history, its audience, or the kind of experience it promises.

That part remains human.

And in fact, today it is no longer just a matter of delivering “some photos.” We need to build a coherent visual world: hero images, room sets, details, lifestyle, F&B, exterior mood, visual continuity across the website, OTAs, social media, and campaigns.

AI does not remove this work. It makes it more efficient. But it does not decide which story the hotel should tell.

THE BEST PROMPT IS NOT WRITTEN IN THE BOX

Hotel photography has always been a form of *interpretation*.

We choose the best moment, the best angle, the best light. We arrange pillows, hide cables, clean surfaces, and control perspectives. We do not show a space at its worst. We represent it in its most desirable version.

AI does not change this logic. It amplifies it.

That is why the point is not how much we can intervene in an image, but how far that intervention remains coherent with the place, the light, and the promise of the hotel.

We need to reposition AI in our minds. The generated output is not the final product. It is the beginning: raw material, a possibility, a very fast draft, sometimes surprising, sometimes completely off track.

The value is not in the fact that the machine produces something. The value is in what we decide to do with it.

Because, in the traveller’s journey, the first experience often does not happen in the hotel. It happens in front of a photograph.

And that photograph has to do something very difficult: make people want to be there, without promising a place that does not exist.

The prompt is not the photograph.
The prompt is only a tool.
The best prompt is the years of experience you bring to the image.

HYB

The Synthetic Gaze: AI Video Advertising and the Cost of Getting It Wrong

Pre-Stay

Kristian Lupinski
Content Producer, Kastian Media

KASTIAN MEDIA
Multimedia Content Production

Drawing on a background in filmmaking, Kristian Lupinski offers a candid, first-person account of experimenting with AI video generation for hospitality marketing and quickly discovering that creative vision and machine output are far from the same thing. The piece raises an unsettling question for the industry: in a race toward synthetic perfection, are hotels optimizing themselves out of the very authenticity that makes a stay worth remembering?

Recently, I spent $35 on a one-month subscription and $10 on AI generation tokens on an AI video platform, thinking it would be enough to experiment for an afternoon. The platform gave me 1,000 credits. Each eight-second video generation costs roughly 250 credits. After four attempts, none of the footage was usable, despite detailed explanations and reference images.

Despite a background in filmmaking, where I learned how visual storytelling shapes perception, I expected my expertise to translate to AI-generated video. It didn't. The results felt strange and unnatural, proving that a cinematic idea doesn't automatically become a machine-readable instruction.

This personal experience echoes a broader industry shift. Over the last few months, nearly every hospitality conversation I've had has eventually turned toward AI, new integrations, new platforms, and new promises. It's clear that hospitality advertising is poised to become AI-driven. But therein lies a large problem, which I will come back to.

The impact goes further. AI isn't just helping hospitality marketing anymore; it's starting to influence how people are persuaded in the first place.

For years, hotel marketing relied on some very key fundamentals. Beautiful visuals of the surrounding area created emotional aspiration. Travelers imagined themselves not just staying in a comfortable place, but exploring all the place has to offer. Simply put, people see a place, imagine themselves there, start researching, and eventually decide whether to book. On a side note, there has always been Photoshop, at least since I have been in digital marketing. I would crop a helicopter from one image and drop it into another because the background was better. Both real, just not taken at the same time.

This shift is significant. AI changes both the speed and structure of marketing, especially in video content.

A hotel can now generate dozens of campaign variations in the time it once took to produce a single edit… And not just that, but it can be highly personalized, localized, and, the best part, optimized for any channel you choose.

At first glance, this feels empowering: "Now, I can compete with the big dogs." In some ways, that's true. However, there's another side to this shift that the industry is still underestimating.

The real challenge is the significant risk of losing authenticity and trust if we apply AI-driven advertising carelessly in hospitality.

Perhaps the biggest risk is losing sight of what actually feels honest.

Hospitality already runs on emotion as much as practicality. Hotels are not just selling rooms; they sell anticipation, atmosphere, experience, and ultimately memory.

As promised, here's why this becomes a problem.

The current wave of Gen-AI advertising is producing an incredible amount of content that looks impressive but doesn't really make you feel anything. Every one of these places has perfect sunsets. Perfect buildings. Perfect lighting. Perfect people having perfectly "optimized" experiences. The aesthetic quality is often enough to create excitement, maybe some reshares, but not high enough to create TRUST (Rosli et al., 2025).

And in my opinion, TRUST matters more in hospitality than in almost any other industry. The guest will eventually arrive. A hotel cannot remain purely digital. Reality fulfills the promise.

This is why I argue that the core disruption isn't just AI-generated content itself, but the shift to creating content that targets algorithms rather than people: the Synthetic Gaze.

Traditionally, advertising focused on human emotion and psychological response (human focus). Now, another audience is involved: machines (AI focus).

Being a content creator, I know, and it hurts, because even if you make a really strong piece of content, Algorithms determine visibility (Ferrara, 2026). Sites like YouTube have recommendation engines that shape discovery. LLMs are increasingly mediating search. Many social platforms decide distribution before human audiences even engage, and in many cases, content is now designed as much for this algorithmic interpretation as it is for emotional relatability (Meguellati et al., 2025).

In hotel marketing, we are no longer only competing for human attention. We are now trying to satisfy both algorithms (AI-focused) and audiences (human-focused).

This idea may seem foreign until you see it in practice. For example, a travel video might truly capture the human feeling of a place, but still perform poorly because the algorithm (AI focus) prefers a version that keeps viewers engaged longer. Over time, creative decisions become shaped by what the system rewards (AI focus). Editing is driven by retention metrics, copy is crafted for search visibility, and content focuses more on algorithmic behavior than on creating a human emotional experience.

That's not to say these changes are all negative. Some are genuinely transformative. AI empowers hospitality brands to personalize communication, localize campaigns, and experiment creatively at a scale previously impossible.

The main risk is that AI tools make it tempting to chase high engagement instead of a real connection. Content is perfected for algorithms, but at the cost of authenticity and emotional trust.

A rooftop bar becomes more atmospheric and fantastical than reality can sustain. The ocean becomes unnaturally cinematic. And for me, the biggest issue is that human interactions can become so polished that they stop feeling human.

AI does not suddenly make advertising fake. As I mentioned earlier, I have faked it without AI; the difference is how easy AI makes it.

That changes the thinking and direction of marketing teams. When generating another version costs only a few strokes on the keyboard and a few credits, the natural "this can work" that once existed in production disappears. Continuous iteration becomes possible. Campaigns can be refined over and over again toward high engagement metrics while drifting further from the truth (Ferrara, 2026).

There's an irony here. The more machine-generated or "synthetic" content the market sees, the more valuable genuinely human signals may become.

As travelers become increasingly exposed to machine-generated imagery, they may begin gravitating toward experiences that feel harder to fake. Not perfection, but the subtle imperfections and human details that make something feel authentic.

I have seen so many AI-generated campaigns; they look great, but I can tell you that none have stuck with me. They succeed visually and do fill me with a sense of awe at how far we have come in such a short period, but they fail psychologically.

People are surprisingly sensitive to what feels "off." We may not always consciously understand why something feels artificial, but we instinctively recognize the absence of authenticity. To borrow Simone's term from the foreword, it's the "uncanny".

That instinct matters because hospitality is, at its core, deeply human. A stay in a hotel is not experienced like digital media. You experience it in the real world. When you enter, there is the smell of the lobby, or there is the charm of a recommendation from the receptionist, the soft lighting in a corridor at night, the layout and comfort of your home away from home, even for just a night. These are the details that form memory.

AI can generate anticipation for these moments, but can't fully replicate the emotional impact they leave behind.

But authenticity isn't the only hidden cost here. Shifting focus, the financial implications of all this are equally important.

Much of the AI discussion I hear, at least in marketing, is more focused on the creative side rather than the machine infrastructure that enables the outputs.

Every generated image, video, or personalized interaction still has a real cost. Processing power, storage, energy use, it all adds up (PwC, 2025). But most people never really think about that because the whole experience is designed to feel effortless. You buy credits, click generate, and move on. The problem is that the costs start piling up very quickly once experimentation becomes constant.

My own experience illustrated how quickly experimentation adds up. Four eight-second clips disappeared almost instantly as I tried to understand the prompting. $10 gone, unusable material that won't see the light of day. Iteration becomes costly.

Ultimately, access to new tools is one thing; knowing how to wield them well is another.

Knowing how to create effective AI-generated advertising is definitely on the rise in emerging professions (PwC, 2025). It requires not only creative instinct but a technical understanding of how these systems interpret language, movement, continuity (this is an extremely hard one to master), mood, lighting, and, most importantly, emotional cues. In some ways, prompting to me feels less like directing and more like negotiating.

Because while this industry (and many others) is racing toward automation, travelers will always be searching for something deeply human on the other side of the screen.

Hospitality now faces a pivotal moment: the industry is becoming more artificial just as travelers increasingly seek authenticity. This tension will define the winners and losers ahead.

The brands that will succeed are those that know when AI-generated enhancements strengthen the story (AI focus), and when the human side of the experience matters more (human focus).

Technology may capture attention instantly, but it is the genuine, lived experiences that leave a lasting impression. The brands that recognize this will ultimately be the ones people remember.

REFERENCES

Ferrara, E. (2026) 'The Generative AI Paradox: GenAI and the erosion of trust, the corrosion of information verification, and the demise of truth', arXiv preprint. Available at: https://arxiv.org/abs/2601.00306 (Accessed: 22 May 2026).

Meguellati, E., Zhao, X., Li, Y. and Chen, H. (2025) 'LLM-Generated Ads: From Personalization Parity to Persuasion Superiority', arXiv preprint. Available at: https://arxiv.org/abs/2512.03373 (Accessed: 20 May 2026).

PwC (2025) AI at the Heart of Tourism and Hospitality – Powering the Future. Available at: https://www.pwc.com/m1/en/publications/2025/docs/ai-tourism-hospitality.pdf (Accessed: 15 May 2026).

Rosli, N.N., Hamid, A., Rahman, S. and Karim, M. (2025) 'AI Generated Content in Hospitality Marketing: Impacts on Brand Image and Booking Intentions', Journal of Tourism Hospitality and Environment Management. Available at: https://gaexcellence.com/jthem/article/download/5967/5467/20072 (Accessed: 17 May 2026).

HYB

The Data Foundation of Agentic Hospitality

Mid-Stay

Vassilis Syropoulos
Founder & CEO, Juyo Analytics

Juyo

Vassilis Syropoulos argues that before hospitality can benefit from agentic AI, it needs to solve a problem most organizations are actively avoiding: the data foundation underneath it. Using the Prometheus metaphor to frame both the promise and the danger, he maps a four-quadrant framework that shows why clean data without hospitality context is still dangerous, and why trust — earned incrementally, proven on the record — is the only legitimate path to autonomous action.

FROM HOSPITALITY INTELLIGENCE TO AUTONOMOUS ACTION: PROMETHEUS DIDN'T INVENT FIRE

Prometheus stole fire from the gods and handed it to mortals. He took something that belonged to the few and opened it to everyone who could now reach it.

AI is the next "theft". It opens a realm of possibility that was, until very recently, the privilege of a handful of operators with deep pockets and large analytics teams. It is genuinely exciting. It is also genuinely dangerous because handing a fire to someone standing on the wrong floor burns the house down.

So before we admire the flame, the question we should be asking: what is it standing on?

THE HARD AND FUNDAMENTAL PART: INTEGRATIONS, DOMAINS, AND DATA

A hotel runs on dozens of disconnected systems: the PMS, the channel manager, the CRS, the booking engine, the CRM, the POS, the rate shopper, the review platform, the accounting system, each with its own format and its own version of the truth. This is the unglamorous reality. Wiring these together, faithfully and durably, is the hard and fundamental part.

Pull those scattered integrations upward, and they organize into three domains, each with its own data, its own tempo, and its own definition of "good."

Guest-facing. Search, booking assistants, concierge: the systems that touch the guest. The metric is conversion. The tempo is real-time. The risk is brand exposure on every reply.

Back office. Night audit, reconciliation, and the P&L close. The metric is accuracy and profit conversion. The tempo is daily, weekly, and monthly. The risk is the silent compounding margin erosion.

Commercial. Demand, rate, mix, distribution. The metric is RevPAR. The tempo is continuous. The risk is falling behind the market.

Three logics, three definitions of "good." The temptation is to treat them as three separate areas. But follow them up one more level, and they reconnect, because they were never really separate.

That is the shape of it: many disparate sources at the base, narrowing into three domains, converging into a single layer. The integrations are the hard part. The convergence is the valuable part.

THE LAYER ABOVE THE DATA FOUNDATION: HOSPITALITY CONTEXT

Plain data on one side and intelligence on the other surface a big gap in between.

The gap is: what the numbers are, which ones matter, how to reason about them, and what a good decision even looks like in this business. Data doesn't necessarily carry that, and generic Intelligence can be too wide. Someone has to encode the connective tissue in between:

The strategy, the mental models, the way an experienced hospitality executive actually thinks.

Two questions decide whether that gap gets filled: is the data clean, and does the system understand hospitality? Cross them, and a matrix falls out.

QUADRANT 1: BAD DATA + NO CONTEXT: THE CONFIDENT LIAR

A generic large language model, when fed a fragmented PMS export, a CRS dump, and a CRM that hasn't been deduplicated in years, will produce beautifully written answers about your ADR strategy, delivered with the confidence of a seasoned analyst.

The conviction that the AI will show is the bug. The output sounds right; the team has no domain expertise to challenge it, and decisions are made on phantom inventory. This is why fundamentals matter before anything else.

QUADRANT 2: BAD DATA + STRONG CONTEXT: THE EDUCATED GUESSER

Counterintuitively, this is safer than Quadrant 1, because a system that understands hospitality semantics can flag its own data problems. "Your group block has no segmentation field; I can't compute displacement." "Your rate plan mapping has 14 unmapped channels for last month."

Strong domain context turns bad data from a silent killer into a visible problem. The AI becomes the data quality auditor. This is the essential first stop on the journey, and it's only possible if someone did the labelling, ontology, and reservation-level work upfront.

QUADRANT 3: CLEAN DATA + NO CONTEXT: THE ELOQUENT TOURIST

Clean pipelines. Modeled warehouse. The AI still treats a room night on the booking date as equivalent to one on the stay date, and reasons about group pace using the transient pace rhythm.

So it gives you a perfectly formatted answer that misses the actual dynamic. Clean data is the floor; the semantic layer, the encoding of how hospitality actually works, is what turns it into intelligence.

QUADRANT 4: CLEAN DATA + STRONG CONTEXT: THE TRUSTED ALLY

This is where AI earns the right to be called intelligence. Clean, labelled, temporally-aware, transaction-level data plus a semantic layer that encodes how hospitality actually works: segments, channels, pace curves, displacement logic, comp set behavior, length-of-stay patterns, cancellation dynamics, flowthrough, revenue per square meter.

THE SCIENCE AND ART OF HOSPITALITY

Hospitality has always been part science, part art. Science is the floor, and it is non-negotiable. Your RevPAR is your RevPAR. Your pickup is your pickup. If two systems report different occupancy for last night, one of them is wrong, and the answer is not "it depends." You don't get to be creative with the numbers, and neither does AI.

However, the questions that actually move the business have always been art: What does this pattern mean? Why is this segment softening? If we hold the rate here, what breaks downstream? None of these has a single correct answer. They live in the known unknowns, and the real opportunity or risk hides in the unknown unknowns, the thing the comp set is seeing that you aren't, the shift nobody thought to put on a dashboard. These are judgment calls with too many variables and too little time. These are the decisions we used to make on instinct and call experience, or art.

AI doesn't end the art. It does what the sharpest instincts always did, except it has read every reservation, every review, and every rate shop at once so it can surface the unknown unknown you'd never have thought to look for, and reason about it out loud.

The mistake is collapsing the two into a single demand. Ask AI for a deterministic answer to a non-deterministic question, and you get the "AI hallucinates" comment: you reached for a counselor and treated it like a calculator. Ask a dashboard for judgment, and you get the "our BI tool is useless" complaint: you reached for a calculator and treated it like a counselor. Pulling ahead means holding the tension between the two and letting the science and the art talk to each other.

TRUST IS THE GATE TO AUTONOMY

Kassandra correctly predicted the future and was believed by no one. It is the oldest lesson in prophecy and the most expensive: being right is worthless if no one trusts the source. An agent only earns its place when trust matches accuracy.

This is the line between hospitality intelligence and autonomous action. Letting an agent suggest a rate sits at one end of the spectrum; letting it push one to the channel manager at 2 a.m. with no human watching sits at the other. Crossing that distance is a deliberate act of trust-building, done in three layers.

No black box. A recommendation that cannot explain itself stays untrustworthy. Every answer has to show its work: the evidence it leaned on, the signals that moved it, the confidence it holds, and the action it proposes. Not “raise Saturday €15” but "Raise Saturday €15, because pace is running twelve points ahead of last year and the comp set just tightened."

Show it visually. We are visual animals. A vast share of the brain's cortex is devoted to sight, and we grasp a picture in a single glance where a paragraph demands deliberate effort. A wall of text describing a softening segment buries the insight. Trust moves at the speed of comprehension, and comprehension is fastest when the answer is rendered for the eye.

Prove it on the record. The hardest layer to create and fake, and the only one that compounds, is outcomes: Scoring past recommendations against what actually happened. Did the pickup the agent predicted materialize? An agent with an honest, visible track record against ground truth earns the right to do more. One without it is asking for faith, and faith is exactly what Kassandra never got.

AUTONOMY LEADS TO A HYBRID ORGANIZATION

Which brings us to the people. The future of a hotel team is a hybrid organization in which humans and agents work alongside each other.

There are three settings, and maturity means knowing which one each decision deserves.

Recommendation only: the agent surfaces the insight, and the human acts. This is the right default for anything high-stakes or novel.

Approval: the agent proposes the action fully formed and waits for a human click. The workhorse setting for the bulk of daily revenue moves.

Autonomous action: the agent executes within the human-set guardrails, reporting after the fact, reserved for high-frequency, low-regret decisions where the floor is solid and the blast radius is small.

An agent starts on recommendation, proves itself against ground truth through evaluation loops you can actually inspect, and graduates to approval, then to bounded autonomy, the same way you’d promote a junior analyst.

What about humans then? They move up the stack. The manual work that disappears makes time for something else: Orchestrating the agents, setting the strategy and the guardrails they execute against, and owning the two things no model can own: Judgment in ambiguity, and ethics.

THE FIRE, AND THE FLOOR

Prometheus gave away fire, and the world changed for everyone who could now use it. But fire is the one gift you cannot rush. Hand it to someone who hasn't mastered it, and it burns down the house.

Agentic hospitality is the future, and the temptation is to skip straight to the flame: full autonomy, agents acting unwatched, the beautiful org chart lit up end to end. You don't reach a destination by skipping the road to it.

The steps come in order, and each one earns the next. First, the integrations, the disparate systems wired into one spine. Then the data tells the truth. Then the context that turns that data into meaning. Then, the answers are trusted enough to act on. Only then does autonomy become something you grant rather than gamble on. Burn through those steps to get to the fire faster, and you end up with the Confident Liar pushing rates to your channel manager at 2 a.m.

The goal is to build the foundation first, step by step, in the right order. Do that, and you get a system hotels will actually let loose on their business, and people who are elevated by working alongside it. The fire is worth having, once the floor is solid.

Juyo | Hospitality Intelligence Platform

BUILT BY HOTELIERS, FOR HOTELIERS

TURN DATA INTO CONFIDENT DECISIONS

Hotel intelligence that thinks like you do

Static reports answer questions you already had. Juyo surfaces the ones you didn't think to ask and walks you from the signal to the cause to the decision.

SOLUTIONS · BUILT FOR EVERY TEAM THAT RUNS THE HOTEL

COMMERCIAL

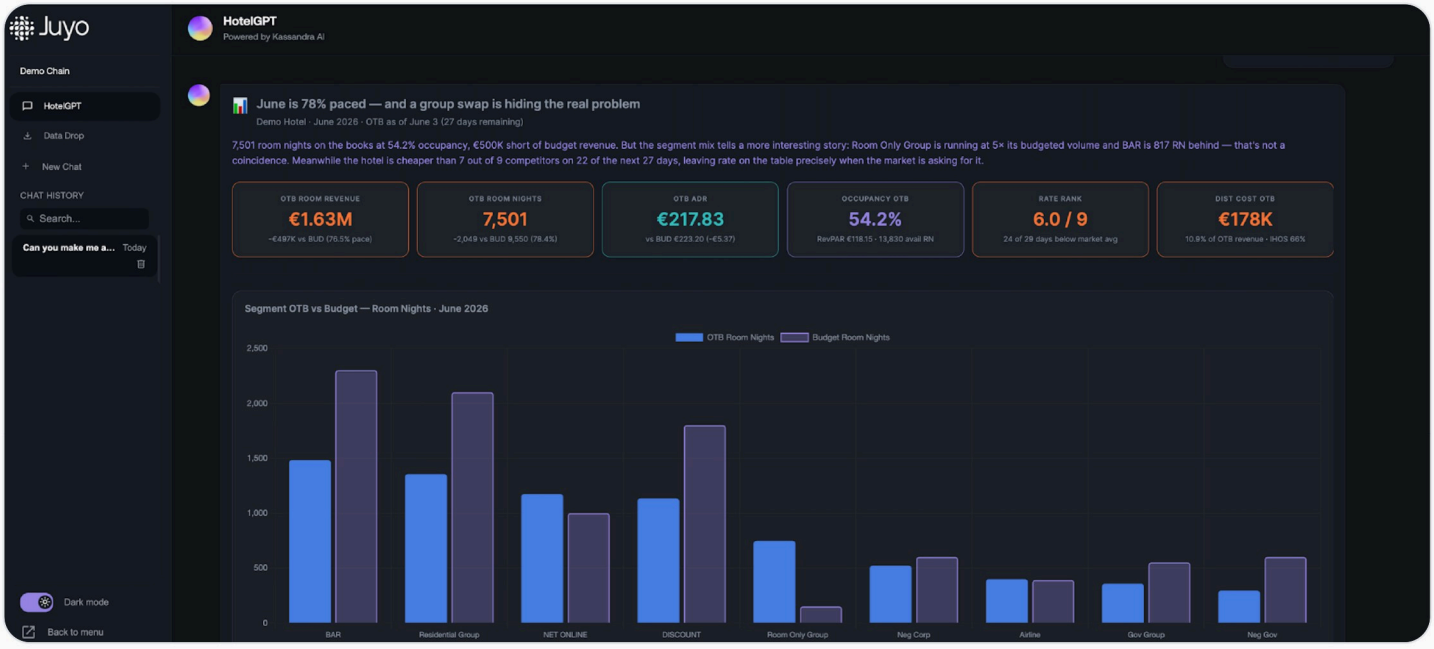
Pricing, pace and channel mix, answered as fast as you can ask.

FINANCE

Month-end, margin and forecast, reconciled and board-ready.

OPERATIONS

Labour, covers and demand, lined up so the floor runs on signal.



1,500+ hotels
already run on Juyo to understand their data

Your stack, connected
PMS, RMS, F&B and market data, no IT project required

EU-hosted · GDPR
Your data stays yours, never trains shared models

Bring your hotel's data to life.

Watch Commercial, Finance and Operations become one source of truth.
Or start with HotelGPT: ask your data anything, pay only for the questions you ask.

Request a demo juyo.ai

Ready to talk? Contact Bram van Berkel, CCO at bram@juyo.ai

HYB

The Agentic Hotel: How Open Infrastructure Turns AI Into Operational Performance

Mid-Stay

Stephan Wiesener
Founder & CTO, Apaleo GmbH

apaleo

Stephan Wiesener argues that the hospitality AI conversation has moved past experimentation into a harder question: what infrastructure actually allows AI agents to take reliable action across real hotel operations? Through concrete case studies from citizenM, THE FLAG Zürich, and Cocoon & Eckelmann Hotels, he makes the case that open, API-first architecture is the unglamorous foundation on which everything else depends.

THE INFRASTRUCTURE THAT WILL DECIDE WHETHER HOTEL AI WORKS

Agentic AI is entering its performance phase in hospitality. The question is no longer whether AI can assist guests or employees. Operators now want measurable ROI, and AI that can work with real operational context across hotel departments, even when those teams use separate tools and systems. This is what separates basic AI assistance from true agentic execution. The former still depends on humans to stitch the work together. The latter can take reliable action, coordinate across systems, and involve people only when judgment or oversight is needed. And infrastructure is the key differentiator.

Let's look at one real example. A guest adds a baby cot request to their booking. In many hotels, this seemingly simple task still depends on a person reading the note, interpreting it, messaging housekeeping, and finally checking to ensure the task was completed. It's something an AI agent can easily handle, but only if the agent can access information in real-time, trigger the appropriate workflow, and take action across different systems. Having an open infrastructure is the best way to optimize the agent's performance.

Over the last 18 months, AI has rapidly moved from experimentation into operational deployment across all aspects of hospitality. Marriott partnered with Google (Starkov, 2025) to include direct hotel bookings into Google's AI Mode, Expedia (Expedia Group, 2026) is investing heavily in conversational AI trip planning, and hotel groups are deploying guest-facing and back-office AI agents.

In these environments, the difference between AI experimentation and operational deployment becomes clear. Many AI solutions perform well in isolation, but far fewer are capable of operating reliably across the day-to-day complexity of a hotel environment. This is more pronounced when a workflow requires action across multiple systems, such as reservations, housekeeping, guest services, or room operations, with staff performing oversight.

Agents can only generate commercial and operational value when they can instantly access live operational data, interact across systems, and work within the operational context of a property, such as aligning with standard operating procedures (SOPs).

In conversations with hotel operators, this is increasingly where the focus lies: not on individual AI tools, but on how those tools can work together reliably across the business.

Rather than relying on a single proprietary agent, hotels increasingly need open environments where multiple agents, applications, and systems can interact through shared API-first infrastructure, allowing capabilities to evolve while remaining aligned with established workflows, permissions, and operational context.

This approach becomes increasingly important as agentic AI continues to evolve. Hotels are making technology decisions expected to support operations for years, while the AI landscape changes almost weekly. Open architectures give operators the flexibility to adopt new capabilities without repeatedly rebuilding their operational foundation as new technologies emerge.

WHY AGENTIC AI MUST FIT THE WAY HOTELS ACTUALLY OPERATE

One of the biggest misconceptions in current hospitality AI discussions is the assumption that every hotel requires the same type of agentic environment. In reality, operating models vary enormously across the industry, and the architecture supporting AI needs to reflect those differences.

A lean select-service property operating with minimal staffing has very different priorities from a luxury resort managing restaurants, spa operations, meetings, concierge services, and high-touch guest experiences. The types of agents, permissions, and workflows required in each environment are fundamentally different.

This is why having a flexible infrastructure matters so much. The goal is not to force hotels into a standardized operating model for the sake of implementing AI, but to enable different property types, staffing structures, and service concepts to build agentic AI ecosystems around the way they already operate.

The next phase of hospitality AI will likely be defined by multi-agent environments where specialized agents coordinate across departments, workflows, and guest touchpoints simultaneously. A guest communication agent may trigger housekeeping activity, a revenue agent may influence room allocation logic, or a finance agent may interact directly with booking and operational data across the property.

This also changes how hotels should think about measuring ROI. The return from agentic AI is not simply labor reduction. It comes from reducing friction across the organization: faster response times, fewer manual handoffs, more consistent service delivery, reduced administrative overhead, improved conversion opportunities, and the ability to scale operations without adding equivalent layers of coordination work.

WHAT CONNECTED AGENTIC AI LOOKS LIKE IN HOTEL OPERATIONS

Another Star, the founding company and operator of the citizenM brand, shows how agentic AI can evolve from a targeted automation initiative into a broader operational model. Two years ago, the company began pioneering the use of AI in non-guest-facing processes such as finance and invoice processing.

Since then, this use case has expanded into a connected ecosystem including guest-facing processes such as voice AI for customer service calls and written communication via email, WhatsApp and OTA channels. It is being used for providing property information, upsell opportunities, service recovery, as well as meetings and group sales. Today, the company operates five live agents in various parts of the business.

The significance is not the number of agents, but how they are working across departments and guest touchpoints with greater consistency. Information and workflows can move between systems without requiring the same level of repetitive manual coordination from staff.

The impact has been improved response times, shorter lead times, fewer manual errors, increased conversion opportunities and more capacity for teams to focus on guest interactions.

Another Star is now moving towards a unified orchestration layer that can coordinate multiple agents across the business. This marks a shift from standalone AI tools to an operating model where agents play a direct role in how the company functions, but more importantly, in the way employees and guests are supported, prepared for, and able to experience their stay.

THE FLAG Zürich demonstrates the same principle but in a different operating environment. At the 101-room property, which operates hotel rooms and serviced apartments, guest requests were often hidden inside reservation comments. A note about a baby cot, extra bed, or special occasion still had to be spotted by reception, interpreted correctly, and passed on to housekeeping. It was simple work, but it created delay, inconsistency, and unnecessary administrative burden.

By introducing a connected AI Trace Agent, those comments can now be read automatically and converted into structured housekeeping tasks. The agent interprets the reservation note, triggers the relevant task in a third-party app, and routes the request to the right operational team in real time. Around 30 tasks are now generated automatically each day, saving approximately 3.5 hours of manual coordination per week while improving execution consistency across departments. It shows how the value of agentic AI is not always found in dramatic transformation. It's often in removing the small, repetitive handoffs that slow operations down every day.

Cocoon & Eckelmann Hotels demonstrates how agentic AI can support consistency at scale in a select-service environment. Across more than 700 rooms, front office teams were spending significant time manually reviewing reservation notes and assigning rooms based on guest preferences, OTA booking comments, and accessibility requirements.

Supported by an API-first architecture, a Room Allocation AI Agent now interprets reservation data automatically and applies customizable allocation logic tailored for each property. This can include floor preference, accessibility, VIP handling, and group bookings.

The result is not just faster room assignment, but more standardized execution across high-volume operations. At one location alone, the agent saves approximately 45 minutes of manual work per day.

Together, these agentic AI deployments demonstrate one of the most important realities of the agentic era: hospitality is unlikely to converge around a single operating model or standardized AI stack. A select-service property, a serviced apartment concept, and a more complex multi-department operation all require different workflows, staffing structures, and service priorities.

What these environments have in common is the flexible architecture enabling the agents. Strategic value increasingly comes from infrastructure capable of supporting different operating models while allowing agent ecosystems to evolve continuously.

THE BEST AI STRATEGIES IN HOSPITALITY START WITH OPENNESS

One of the defining characteristics of the current AI landscape is the speed at which it is evolving. New models, frameworks, and capabilities are emerging continuously, while hotels are making infrastructure decisions expected to support operations for years.

This is where open architecture and interoperability create long-term strategic value. Hotels need the ability to introduce new capabilities and data, change workflows, and replace technologies without rebuilding their operational foundation each time the market shifts. In practice, this means having "swappability": the ability to continuously evolve the agent ecosystem while maintaining operational continuity underneath it.

Hospitality is moving toward a future where hotel operations function through coordinated networks of highly specialized agents operating across guest communication, revenue management, room allocation, housekeeping coordination, finance, and service delivery.

Agentic hospitality depends on open infrastructure, and that's what will move AI from an isolated promise into operational and commercial performance at scale.

REFERENCES

Expedia Group (2026), "Expedia Group B2B Introduces AI Toolkit and Platform for the Future of Travel Distribution", Expedia Group Investor Relations, available at: https://ir.expediagroup.com/news-and-events/news/news-details/2026/Expedia-Group-B2B-Introduces-AI-Toolkit-and-Platform-for-the-Future-of-Travel-Distribution/default.aspx (accessed 1 June 2026).

Starkov, M. (2025), "Hotels in the Cart: Google Just Filed Lodging Under the Same Commerce Rail as Sneakers and Groceries", Hospitality Net, available at: https://www.hospitalitynet.org/opinion/4132620/hotels-in-the-cart-google-just-filed-lodging-under-the-same-commerce-rail-as-sneakers-and-groceries (accessed 1 June 2026).

HYB

The Execution Layer Hotels Are Missing, and Why It Matters Before Agents Arrive

Mid-Stay

George Roukas
President, GAIPAN

GAIPAN

George Roukas identifies the layer most hotel AI strategies are skipping entirely: execution. Brands can build sophisticated loyalty programs and accept intent-rich bookings from AI agents, but if the operational infrastructure cannot reliably deliver what was promised — the right room, the right amenities, the right moment — none of it compounds into loyalty. His argument is that an ontology-based digital twin of hotel operations is what closes that gap, and that now is the time to build it.

Hotels are complex businesses. Every stay has to optimize for several groups at once. The guest wants it to feel easy, personal, and well-executed; the brand wants consistency and loyalty; management wants the property to run smoothly; ownership wants stronger revenue and better margins.

Third-party distributors sell the option with the highest expected value of profitability. By expected value, I mean weighing the likelihood of purchase (showing high-profit items the guest won't buy is a waste of time) against present and future costs (so don't sell a place where customers regularly complain and demand refunds). It's all about optimizing today's Benjamins.

For hotels, it's different. The hotel wants an ongoing relationship with a chance to optimize for the guest's business across a lifetime of opportunities. It's more than revenue per stay; their objectives include better retention, more frequent visits, and the kind of experience people talk about afterward in reviews and to friends who travel.

Restating the obvious? Maybe, but executing on it in a world of chatbots and personal agents (let's just call them agents for brevity) will be very different from web transactions. Agents don't arrive with a simple destination/dates/# guests request. They arrive with an "intent envelope", a mini-RFP of needs and wants, asking hotels to return their best offers *for this specific traveler* and expecting something far more personalized than room types and rate plans. To do it, hotels have to get three things right.

First, brands and hotels need strong loyalty and personalization.

A loyalty program isn't just points and status. It's a way to recognize the guest, apply the right entitlements (upgrade, anyone?), offer incentives they actually value, and tailor the stay in ways that the traveler enjoys. That can mean remembering you like feather pillows, a 68-degree room, or particular food and beverage options (extra M&Ms, please). The details that make a stay feel personal.

Second, hotels need to understand guest intent.

Not every guest wants the same thing. A late-arriving business traveler may want a quiet room, fast check-in, and a comfortable bed. An anniversary couple may want view, atmosphere, dining, and small touches, like hearing "Happy Anniversary, we're glad you chose to spend it with us!" at check-in. The hotel's job is to understand what the guest is really trying to accomplish, then match the right features, services, and offers to that intent. But how does this happen?

A prime reason travelers use agents is that the agents accumulate rich 'memories' of their preferences before planning even begins. So when the traveler makes a request (anything from a simple prompt to a full brainstorming session), the agent combines it with that memory to build an elaborate description of their intent and packages it into the intent envelope. By the time the envelope arrives at the supplier, it carries far more intent signals than you'd get from a web booking widget. And that brings us to the hard part.

Third, hotels need delivery execution.

This is where many hotel strategies succeed or fail. Promising a personalized stay is one thing; aligning the operating teams to deliver it is another. Today, that happens largely through manual processes. I once asked a client whether his company (a top-10 global hotel brand) had an offer management system. He said: "Yes, and no. We built one, but we had to abandon it within about 6 months because the properties couldn't consistently deliver on it."

Notice that the system failed even before agents entered the picture, in a plain world of booking widgets, because properties had no operational way to execute consistently beyond the room-type/rate-plan standard.

So what happens when travelers arrive with elaborate intent envelopes and the hotel answers with a feature-packed offer? Whatever was promised must now be delivered, and that's harder than it sounds. The hotel needs to customize the stay before arrival, adjust it as needed during the stay, and remember what it learns so the next stay is even better.

In simple terms, hotels create the value that drives loyalty and CLV when they match the promise made to the guest with the experience delivered on-property. The good news is that the same kind of technology can fix it. The AI that got us into this mess sits on the guest's side: the agents generating these intent-rich mini-RFPs. The answer is AI on the hotel's side, working the target and current states to close the gaps and deliver on the promise. And it isn't theoretical; it follows a path already proven in other industries, adapted for agentic operation.

We'll get a bit more technical here, but I'll keep it brief.

AN OPERATING MODEL FOR HOTEL EXECUTION AUTOMATION

To automate operations and deliver reliably, the hotel needs to consider three practical questions. What's true right now? (the current state.) What do we want to be true? (the target state.) What needs to happen to close the gap between the two? (the execution layer.)

The **current state** represents what's actually true at a given moment. For a room, that's what's physically present, its condition (clean or dirty), etc. Keeping this current can get involved; at full build, it draws on inspections, room video scans, PMS and other system signals, housekeeping and engineering systems, and staff input.

But it doesn't have to start there. It can begin with basic signals already moving through the property, like a housekeeping signal that a room's been cleaned or the PMS recording that a room's been assigned to a guest for a given date. The model describes the current state better the more you feed it.

The **target state** defines how we want things to be. For a room that includes brand and local SOPs. For a specific guest stay, it includes loyalty benefits, guest preferences, purchased amenities and attributes, and other stay-specific commitments.

To define these two states and make this scalable, the hotel needs a structured model of its property and operations. Technically, that's called an ontology: a schema that describes rooms, room types, attributes, standards, rules, tasks, actions, exceptions, and escalation paths. (Yes, I'm aware that one brand famously does all this with index cards, and others let eye-watering staffing budgets make the magic happen, but neither is universally feasible. Ontologies can apply anywhere, so expect to hear more about them.)

And this isn't a hotel idea, or even a new one; it's how some of the most demanding operations on earth already run. Palantir built its business on its ontology, a model it calls a digital twin of an organization, used to run everything from manufacturing lines to financial operations. Anduril's Lattice platform merges thousands of sensor feeds into an ontology to keep a live picture of a battlespace and task assets against it. Siemens and Nvidia build digital twins of entire factories, allowing BMW and Mercedes-Benz to plan and run plants in a living virtual replica before and while the physical ones operate. A hotel is simpler than a battlespace or an auto plant. Believe me, if the model works there, it will work in a hotel! (Current ontology example here for hotel control systems.)

The cool thing is that a single ontology expresses both states using a common vocabulary, and because they both come from the same model, an AI agent can compare them directly. Does the current state match the target state for this room? When the answer's no, the difference is a gap.

When the agent finds a gap, it can determine the appropriate action, trigger the task, monitor its completion, and verify whether the issue was actually resolved. If the task succeeds, the current state updates. If it doesn't, or the situation calls for judgment, the agent escalates to a human with an explanation. Remember the AI that's going to get us out of this mess? This is it. Give an ontology to a capable agent, and it's a party!

Take the anniversary couple from earlier. Their agent books the stay and confirms a quiet high-floor room, feather-free bedding, champagne on arrival, and a late checkout tied to loyalty status. The target state includes those promises. The current state shows the assigned room is available but not feather-free, and it sits next to the elevator.

The system flags the gap, finds a better room, triggers housekeeping to swap the bedding, confirms the amenity, and alerts the front desk to acknowledge the anniversary at arrival. No one had to remember to check.

Let's be honest, this isn't going to happen all at once. Consumer agents will roll out later in 2026, creating intent envelopes that hotels will initially address with conventional responses that begin with loyalty entitlements and include some limited preferences. This will earn bookings, but over time, the hotels with richer offers will get a bigger slice of the pie. Defining and automating your ontology will take some careful thought, so now is really the best time to start. Agents have the potential to attract significant demand from intermediaries, and savings in distribution costs will more than cover the costs of creating and enabling them. The benefits of success are there if we can deliver on the promises, but the hangover will be awful if we don't.

STILL, THE HUMAN TOUCH PREVAILS

The point of automation isn't to replace hospitality. It's to help hotels keep the promises they make to guests, which matters more as agent-driven demand creates more operational complexity. Automation can help ensure the room is ready, building trust and creating an environment more fertile for the elusive 'magic moments' of real engagement.

This is also where the hotel's economics finally come back into focus. The intermediary optimizes the expected value of a single transaction and calls it a day. The hotel, by reliably delivering on its promises, optimizes something the distributor can't even see: the lifetime value of a guest who comes back, tells friends, and writes the review that brings others.

Real hospitality still depends on people: the warmth of recognition (I, for one, will be sooo happy to never again hear "have you stayed with us before?" when I've been at the property enough times to have a room named after me), the judgment to know when a situation is on shaky ground, and the instinct to know what to say or do. The goal isn't to automate hospitality out of the hotel. It's to remove enough operational friction that staff have more room to actually engage in it.

Technology can help ensure the promise is kept. People still make the promise mean something.

HYB

AI Adoption Is Accelerating. Here's How Hotels Are Keeping Pace

Mid-Stay

Catherine Donaldson
Director of Marketing, Canary Technologies

CANARY TECHNOLOGIES

Catherine Donaldson takes a decidedly practical approach, moving past the philosophical debates about AI in hospitality to focus on where it is already delivering measurable results today. From AI voice agents answering calls around the clock to agentic workflows that coordinate operations without manual handoffs, she maps five proven use cases and makes the case that the performance gap between adopters and laggards is already widening.

The verdict is in: AI is creating major gains in hospitality. Seventy-one percent of hoteliers say AI is already having a major impact on their operations, up 10 percentage points from the year prior. Over 80% of hoteliers plan to increase adoption across their operations, with only 1% anticipating pulling back (Canary Technologies, 2026).

For hotels still on the sidelines, the performance gap is only widening. Here's where AI is already working in hospitality: the proven use cases, the measurable results, and how agentic automation is helping real hoteliers right now.

HOSPITALITY AI: FROM EMERGING TECH TO MAINSTREAM USE

Any time new technology emerges, there's a predictable adoption curve: A handful of early movers try it, confidence builds, and eventually, it becomes the new baseline. Hospitality has seen this many times: think electronic locks replacing physical ones or digital credit card authorizations replacing faxes.

Agentic AI is following a familiar pattern, but this time, the pace is accelerated. The breadth of use cases, the speed of improvement, and the depth of integration across the tech stack mean hotels aren't choosing between early adoption and caution. They're choosing between the gains of keeping pace and the losses of falling behind.

Hoteliers are reporting that this is already happening: 85% expect to allocate at least 5% of their IT budget to AI this year. And for those who have already invested, the results are compelling. Over 60% of hoteliers using AI report meaningful staff time savings and improved guest satisfaction (Canary Technologies, 2026). When AI absorbs the high-volume, repetitive admin work, staff are freed to focus on what matters most: high-value, in-person hospitality.

Front desk teams that used to spend their shifts fielding the same questions over and over again now have bandwidth for in-person interactions and complex issue resolution. Properties are automatically generating bookings and ancillary revenue with AI that answers calls, texts, and web chats from interested travelers and current guests alike. Guests are getting personalized recommendations and instant responses to service requests at any time of the day. And in the background, AI is agentically completing full workflows to facilitate this at scale.

What these anecdotes don't capture is the compounding effect. Hotels that started AI implementation early on have moved past the experimentation phase. They're now refining their strategy, homing in on real results and reaping the benefits of automation.

5 AI USE CASES FOR GUEST AND STAFF ENGAGEMENT

How is AI influencing the stay? How are guests and staff feeling the effects of AI? Where are there service gains from agentic workflows? Here are five areas where AI is already delivering results.

1. EXTEND IN-STAY SERVICE TO BOOKING

The guest relationship starts before arrival, and often before the booking itself. Every day, travelers research properties and land on questions that aren't immediately answered on the website: pet policies, availability of adjoining rooms, shuttle schedules, and group rates.

AI-powered webchat and voice agents engage prospective guests in real time, answering property-specific questions and assisting travelers with booking reservations. Hotels effectively extend the service expected by guests to travelers by incorporating personalization, instant responses, and request fulfillment from the start.

In one example from a major hotel brand's earnings call, deploying agentic AI agents drove hundreds of basis points of additional direct bookings across their portfolio (Wyndham Hotels & Resorts, 2026). For hotels that prioritize guest service at the point of booking as a strategic goal, pre-stay AI engagement both drives revenue and sets the tone for service expectations before the stay.

2. ANSWER EVERY CALL

Once a guest is on property, the questions keep coming: Pool hours, breakfast times, late checkout requests, local restaurant recommendations, extra towels. These are low-complexity requests, but they arrive in high volume, landing on front desk teams who are already juggling check-ins, phone calls, and walk-up interactions.

AI voice agents handle the routine load automatically. They answer every call, at any hour, with responses that reflect the property's actual policies and amenities. Complex matters get routed to the front desk, but only when a human is actually needed. The result is a front desk team that spends less time on the phone and more time with the guest standing in front of them.

3. BE A CONCIERGE FOR EVERY GUEST, AT EVERY HOUR

Guests have questions throughout their stay, and expectations that go beyond a quick answer. Where should we eat tonight? Is there a good hiking trail nearby? Can we get extra pillows? AI guest communication handles it all across every channel guests already use, drawing on a hotel-specific knowledge base to respond instantly with answers that reflect the property's actual policies, amenities, and local context.

The concierge dimension is what separates agentic AI responses from basic automation. A guest asking about gluten-free dinner options gets a recommendation suited to the occasion. A family traveling with children gets different suggestions than a solo business traveler. When something requires genuine human judgment, staff step in. But for the high volume of interactions that simply need a knowledgeable, responsive answer, AI handles them consistently well.

Ninety-two percent of hoteliers say they have adopted or plan to adopt AI guest messaging, making it one of the most widely embraced applications in the industry (Canary Technologies, 2026a).

4. COORDINATE OPERATIONS WITHOUT THE MANUAL HANDOFFS

Behind every smooth guest experience is a chain of operational handoffs: a request logged, a ticket created, a team notified, a follow-up confirmed. In most hotels, a significant portion of that coordination still runs through staff, who act as relays between systems and departments. It works, but it creates friction, and when friction compounds, service suffers.

Agentic AI functions as a command center for back-of-house coordination. When a guest opts for reduced room cleanings, AI optimizes the housekeeping schedule accordingly. When a maintenance issue surfaces through guest messaging, it becomes a tracked work order without a staff member manually entering in the details. When a guest requests late checkout, the system checks availability against the property management system and responds with what's available: a confirmation for loyalty guests, an add-on offer for others.

Of course, this provides fast service, but it also guarantees consistency. Requests that previously depended on the right person seeing the right message at the right time now move through a defined workflow, regardless of how busy the hotel is. For operations teams managing high volumes across a property, that reliability is the difference between a service standard and a service aspiration.

5. CAPTURE MORE REVENUE AT EVERY STAGE OF THE STAY

Hotels have traditionally had narrow windows to generate revenue beyond the room rate: the booking process and the occasional front desk agent upsell pitch. Miss those moments and the opportunity is gone.

AI expands that window considerably. On the guest side, AI-powered upselling surfaces relevant offers automatically throughout the stay: an early check-in offer the night before arrival, a dining package when a guest asks about the restaurant, and a late checkout the morning after a wedding reception. These offers go out without a staff member initiating them, timed to the moment a guest is most likely to say yes. Properties that use AI upselling consistently report thousands of dollars a month in ancillary revenue and significantly higher conversion rates than with manual outreach.

On the group and events side, the revenue opportunity is larger, but the friction has historically been greater. A sales manager juggling multiple RFPs simultaneously has real limits on response time, and slow follow-up loses business to properties that reply first. AI sales agents handle the full inquiry-to-contract workflow: instant first response across every channel, automated lead qualification, tailored proposal generation, digital contract signature and deposit collection. The sales team inherits ready-to-act opportunities rather than a backlog of cold leads.

Together, these two capabilities turn revenue generation from a staffing-dependent function into a consistent operational one.

3 EASY WAYS TO WIN WITH AI

Considering scaling AI? The most effective AI adoption strategies start with high-impact use cases, demonstrate results quickly, and expand rapidly. Here's how to get started:

- **Start with a use case that shows quick ROI.** Build momentum early by picking a high-impact, low-complexity problem first (something like guest messaging, event sales or upsells) where results are visible immediately. Early wins create internal buy-in and quickly make the case for expansion.
- **Go industry-specific, not generic.** General AI tools aren't built for the specific needs of the hospitality industry. A platform that's purpose-built for hotels will outperform a generic solution adapted to fit, with all the hotel-specific tech integrations built right in.
- **Prioritize agentic solutions.** Responding to a guest message is useful. Automatically routing a maintenance request, following up, and closing the loop without staff involvement is transformative. Look for AI that completes workflows, not just one that answers questions.

The hotels that will see results the quickest are those that pick a starting point, move fast, and iterate as they go. With the right platform and the right use cases, the path from first implementation to measurable ROI is shorter than most expect.

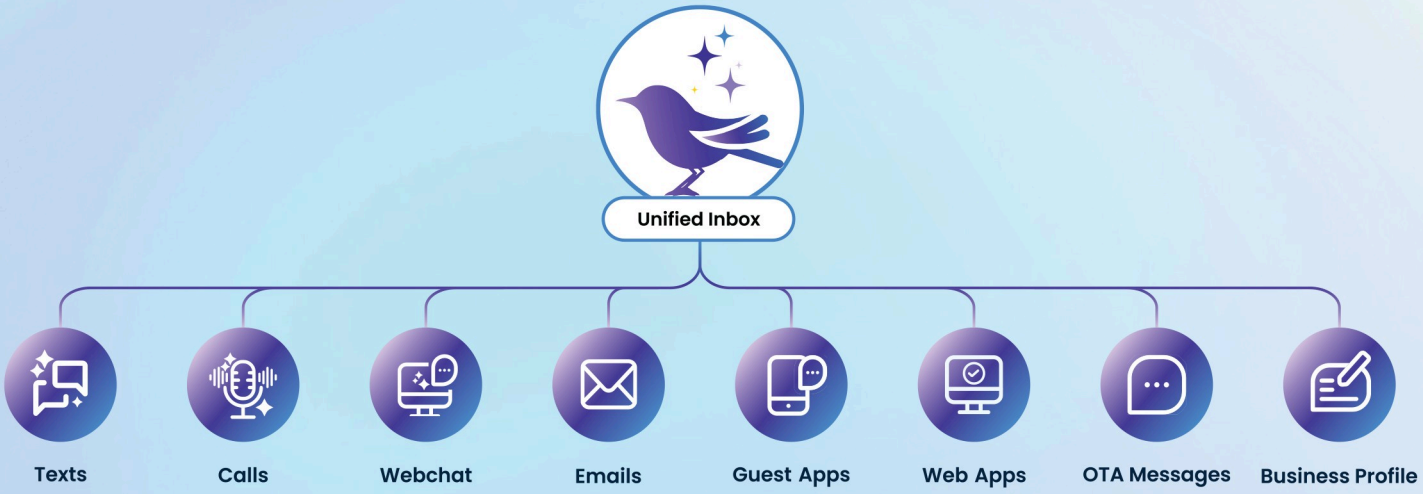
REFERENCES

Canary Technologies. (2026) *Navigating AI: Hospitality Shifts From Exploration to Execution*, 19 March. Available at: https://resources.canarytechnologies.com/ai-hospitality-research.html [Accessed 28 May 2026]

Wyndham Hotels & Resorts, Inc. (2026) *Q4 2025 Earnings Call*, February 19. Available at: https://investor.wyndhamhotels.com/news-events/upcoming-recent-events/detail/23620/fourth-quarter-and-full-year-2025-wyndham-hotels-resorts [accessed 1 June 2026]

CANARY TECHNOLOGIES

Every Guest. Every Channel. One AI Platform.



Learn More about Canary AI

Trusted by 20,000+ Hotels in 120+ Countries

WYNDHAM HOTELS & RESORTS · CHOICE HOTELS · HYATT · Marriott INTERNATIONAL · BWH Endorsed Supplier · IHG HOTELS & RESORTS

HYB

The Lobby Boy v2031 or How Hotels Learned to Stop Worrying and Love the HXO

Mid-Stay

Terence Ronson
Founder & Managing Director, Pertlink Limited

PERTLINK
PUTS THE AI INTO HOSPITALITY

Terence Ronson looks ahead to 2031, when frictionless automation will have made most hotels equally smart, equally efficient, and equally forgettable — and argues that the competitive differentiator will be a new role he calls the Human Experience Orchestrator. Part behavioral psychologist, part operational commander, the HXO is the person who reads the AI's outputs and then decides, with genuine human judgment, what to actually do with them.

Picture this. The year is 2031. A guest arrives at your hotel. There was no check-in queue. There was no check-in. The door recognized her. The elevator knew her floor. The thermostat had developed firm opinions about her ideal sleeping temperature and acted on them without asking. The minibar pre-stocked itself with the oat milk she mentioned (once, in passing) to a chatbot eighteen months ago. The AI didn't just remember. It *cared*, in the way that only a system with no feelings whatsoever can care.

And she stands in the lobby, surrounded by frictionless perfection, and feels… nothing in particular.

This is the automation paradox. Not a bug. A feature. A feature nobody ordered.

Which is worth following all the way through, because every guest journey has three acts. The before (pre-stay), the during (mid-stay), and the after (post-stay). The machine has already conquered the first: it books, predicts, pre-stocks, and unlocks doors with faintly unsettling grace. It is busy annexing the second. But the third (the version of events she'll recount to a colleague next Tuesday) remains gloriously beyond its reach. Technology now threads the entire arc of the traveler's journey. The open question is who tends the moments it cannot.

THE GRAND BUDAPEST PROBLEM

In Wes Anderson's *The Grand Budapest Hotel*, Zero Moustafa is the Lobby Boy: omnipresent, exquisitely discreet, quietly indispensable. He anticipates. He intercepts. He disappears at exactly the right moment. He is, in essence, what every hospitality leader claims to want from their staff, and what most organizational charts make structurally impossible.

The idea has been floated: the Lobby Boy is coming back. Not as nostalgia. As a necessity. As the human counterweight to a hotel that has been, with considerable investment and genuine ingenuity, automated into emotional neutrality.

Right idea. The title, though, needs work.

ENTER THE HXO

"Lobby Boy" is charming. It also conjures a teenager in a pillbox hat handing out telegrams. What we're describing in 2031 is something considerably more formidable.

Meet the **Human Experience Orchestrator**.

The HXO is not a concierge. Not guest relations. Absolutely not a rebranded bellhop. This is the person who sits at the intersection of behavioral psychology, operational command, and (here's the part that makes the tech vendors nervous) *the ability to know when to ignore the algorithm*.

When every hotel has adopted the same AI platforms, the same frictionless stack, the same predictive, everything, those advantages quietly cancel each other out. You are left with properties that are equally smart, equally efficient, equally invisible in their execution, and therefore equally undifferentiated. What remains? The human. The specifically, irreducibly, stubbornly human.

WHAT THE HXO ACTUALLY DOES

By 2031, the hotel's nervous system is humming. Every platform is fused into a single data layer that knows guests better than their therapists, and, unlike the therapists, never takes August off. AI agents predicting behavior in real time: fatigue levels, emotional state, and deviations from routine. Obsessively right. Socially questionable.

The HXO reads those outputs. And then, crucially, doesn't unthinkingly obey them.

When the system flags "high-value guest, elevated stress markers, third delay this week," the HXO doesn't fire off a templated sympathy message and log a completed task. They intercept. They read the room. They apply what no model can reliably replicate: cultural nuance, emotional register, the micro-reading of a person in space.

The real question underneath all of it: *did someone actually care enough to notice?* Did a human being look up from the dashboard and think about what this particular moment means to this particular person?

The HXO is the answer made present in the lobby.

THE 60-SECOND WINDOW (AND WHY IT IS MERCILESS)

The modern guest is not looking for a conversation. They are looking for evidence that someone noticed, and then either helped or got out of the way.

The HXO operates on a brutal internal metric: the **60-second window**. Solve it, enhance it, or exit, no third option involving prolonged hovering.

This is harder than it sounds. It requires operational authority to act across departments without having to file a ticket. Real-time situational awareness of the entire building. And, what most hotel org charts are structurally allergic to, the *freedom to act*.

Which is precisely why placing this role under Front Office is a mistake. Guest Relations is worse. The HXO reports to the General Manager or Experience Director, with cross-departmental reach and zero bureaucratic friction. The moment you require an HXO to seek approval before replacing a broken hairdryer, you have missed the point entirely, and probably the guest as well.

THE SKILLSET NOBODY IS TRAINING FOR (YET)

Five things. Non-negotiable.

Behavioral intelligence - reading micro-signals at speed, across cultures, without assumption. The raised eyebrow that means "I'm fine, leave me alone" versus the raised eyebrow that means "I genuinely need help and am too polite to say so." These are different eyebrows.

Interpretive AI literacy - not technical fluency, but something rarer: knowing *why* the system is suggesting something, and more importantly, when it's wrong. Loyalty programs get over-engineered and under-delivered precisely when the algorithm mistakes frequency for feeling. The HXO knows the difference.

Situational awareness - full operational consciousness of the hotel in real time. Not the app dashboard. The actual building, with actual humans in it, having actual moments.

Discretion engineering - the wisdom of strategic non-intervention. The rarest luxury in an always-on world is the unscripted moment. The HXO creates the conditions for it. And sometimes the best condition is: the HXO is nowhere to be seen.

Narrative crafting - turning a stay into something the guest will actually describe to another human being. Not "the app worked great." Something that starts with "there was this person, and they just-"

That incomplete sentence is the whole brief.

Notice when that sentence actually gets finished: not at the desk, but later, over dinner, in a five-star review, to a stranger seated beside her on a flight. That is the post-stay act, the closing chapter of the journey, and it is the one chapter no algorithm can stage-manage. By then, the guest has checked out, the data layer has gone quiet, and the only system still running is her memory. What the HXO is really building is whatever survives in there.

THE ECONOMICS (FOR THE SKEPTICS)

Full transparency: AI will reduce headcount in transactional roles. It already is. The relevant question is not whether, it's *where* the redeployment lands.

The HXO is not an added cost. It is human capital redirected from low-impact repetition to high-impact moments. Fewer staff overall. Meaningfully higher skill level-measurable improvement in loyalty and the ability to charge a rate that reflects it.

The alternative (full frictionlessness, no human layer) produces the *perfectly efficient, completely forgettable hotel*. Technically excellent. Spiritually inert. Indistinguishable from the property next door running the same platform on the same infrastructure, serving the same oat milk to the same emotionally underwhelmed guest.

The guest, it should be noted, cannot opt out of a hotel that has decided warm human contact is no longer its problem. That is an institutional decision. So are the consequences.

THE DISCIPLINE, NOT THE JOB

Here is the reframe that matters.

By 2031, the Lobby Boy role will no longer exist. It returns as a *discipline*.

A philosophy of practice. A trained, AI-augmented approach to human presence in automated space. An acknowledgment (radical, apparently, given how rarely it is acted upon) that as the industry hurtles toward biological-technological convergence and questions about what it even means to be a guest in a building run by inference engines, the hotels that will win are the ones that continue to treat the person in front of them like a person.

Zero Moustafa would understand immediately. He always did.

The HXO has inherited his brief, upgraded his toolkit, and has sixty seconds.

Don't keep him waiting.

P.S. The photo below was taken at the Hong Kong Hilton in 1975

HYB

True Recognition at the Front Desk: A More Personal Check-In

Mid-Stay

Alan Young
VP, Strategy | Hospitality, Infor

infor

Alan Young argues that voice recognition technology at the front desk is not a cost-cutting measure but a means of restoring something the industry has been quietly losing: the agent's attention. By offloading administrative commands to speech, the technology frees staff to do what no system can replicate — make a guest feel genuinely seen upon arrival.

> *While it may be impossible to quantify in financial terms the impact of making someone feel good, don't think for a second that it doesn't matter. In fact, it matters more*
>
> *— Will Guidara, Unreasonable Hospitality: The Remarkable Power of Giving People More Than They Expect*

The ritual of arriving at a place of lodging is almost as old as travel itself. In the inns of the ancient world, a weary traveler was met at the door by an innkeeper who often knew the guest by name. During the Middle Ages and in the grand hotels of the nineteenth century, the welcome became more formal: a uniformed clerk standing behind a polished wooden counter, a leather-bound register to be signed by hand, and a wall of brass hooks holding heavy room keys.

The arrival of the telephone, the typewriter, and eventually the computer repeatedly reshaped that counter. The paper register gave way to index cards, then to magnetic key cards, and, most recently, to mobile apps and self-service kiosks that let guests bypass the desk altogether.

Through every one of these shifts, the underlying tension has stayed the same: how to handle the administrative work of arrival without losing the human warmth of being welcomed. Voice recognition technologies, and the human engagement they enable, are the latest chapter in that long story.

This tension is older than the hotel industry itself. Hospitality has always existed at the intersection of efficiency and humanity. Travelers need beds, keys, payments, directions, and logistics, but they also need recognition. The difference between being processed and being welcomed is often measured not in minutes but in attention.

A guest rarely remembers how quickly a form was completed. They remember whether someone looked them in the eye, remembered their name, anticipated a need, or made them feel that their arrival mattered. Every technological innovation at the front desk ultimately succeeds or fails according to that simple metric.

For most guests, the hotel experience begins at the front desk. It is also where first impressions are won or lost. A long queue, a fumbled reservation, or a clerk buried in a keyboard and a monitor can undercut even the most beautifully appointed property. Increasingly, hotel operators are turning to voice recognition, implementing tools that let front-desk agents check in guests by speaking rather than typing, and turning a routine transaction into a moment of genuine hospitality.

THE PROBLEM WITH THE TRADITIONAL CHECK-IN

The conventional check-in workflow has changed little over the past decades. An agent greets the guest, asks for a name and identification, searches the property management system, confirms the reservation, assigns a room when necessary, processes payment, and programs a key. Each step requires the agent to look down at a screen rather than at the person standing in front of them.

In doing so, the receptionist risks becoming what Simone Puorto has described as the "Reverse Uncanny Valley/Olympia Effect": a fully human employee who nevertheless appears increasingly machine-like because their attention is focused on a screen rather than on the guest. The paradox is striking. As technology becomes more human in its interfaces, humans often become more robotic in their behavior. During peak arrival windows, those seconds compound into lines that stretch across the lobby, leaving guests feeling processed rather than welcomed.

The friction is not only a guest-experience issue. It is an operational one. Slow check-ins tie up staff, create bottlenecks during shift changes, and make it harder to handle the upsells and special requests that drive revenue and loyalty.

HOW VOICE RECOGNITION CHANGES THE WORKFLOW

A voice-enabled platform allows the agent to navigate the property management system through natural speech. Instead of clicking through menus, the agent can speak a command (pulling up a reservation, confirming a room type, applying a loyalty profile, or noting a special request) while maintaining eye contact and conversation with the guest. The system transcribes speech, interprets the agent's intent, and executes the requested action in the background.

The practical effect is that the agent's attention returns to the guest. Rather than narrating what the screen is doing, the agent can simply talk to the person checking in, and the technology keeps pace. Modern voice models are accurate enough to handle guest names, room categories, and routine commands that make up the bulk of check-in interactions, and they continue to improve with use.

FASTER SERVICE, WITHOUT CUTTING CORNERS

Speed is the most immediate benefit. Spoken commands are often quicker than navigating a series of screens, particularly for experienced agents who no longer need to hunt for the right field or menu. Shorter check-ins mean shorter queues, and shorter queues free staff to focus on higher-value guest interactions.

Importantly, faster does not have to mean diminished guest engagement. Because the agent is no longer tethered to the keyboard, the time saved can be reinvested in the guest: offering a room upgrade, explaining property amenities, or simply making the guest feel recognized and valued. Technology absorbs the administrative burden so the human can focus on building a relationship rather than completing a transaction.

MAKING EACH VISIT FEEL SPECIAL

Voice platforms can also draw on guest history to personalize the encounter. When a returning guest arrives, the agent can quickly surface preferences (a high floor, a particular pillow type, a favorite on-property restaurant) and acknowledge them naturally during the conversation. These small touches signal that the guest is remembered, which is one of the most reliable drivers of loyalty in hospitality.

For properties serving international travelers, voice tools can support multiple languages and accents, helping agents assist guests who may not share a common language and reducing the awkwardness of miscommunication at arrival.

CONSIDERATIONS FOR OPERATORS

Adopting voice recognition is not without its challenges. Lobbies are noisy environments, so platforms must be robust to background sound and capable of distinguishing the agent's commands from ambient chatter. Integration with the existing property management system is essential; a voice layer that does not connect cleanly to core systems will create more friction than it removes. Staff training matters too: agents need to learn which commands work best and how to blend voice interaction with the human conversation rather than letting one interrupt the other. One area that will benefit significantly is new-hire onboarding: rather than spending extended time learning a complex platform, staff will primarily need to master a set of spoken commands and understand how to execute them naturally in guest conversations.

Data privacy is a significant consideration. Guests share sensitive information at check-in, and any voice system must handle that data securely and in compliance with applicable regulations. Beyond privacy, ensuring that voice commands are tied to authenticated agents (not arbitrary users) is equally critical. A comprehensive audit log of all interactions must be maintained and regularly reviewed.

THE BOTTOM LINE

Voice recognition is not about replacing the front-desk agent. It is about freeing that agent to do what technology cannot: make a guest feel genuinely welcomed. By moving the administrative work to spoken commands, hotels can shorten lines, speed up arrivals, and reclaim the human moments that define hospitality. For operators weighing the investment, the question is less about whether voice will reach the front desk and more about how to use new technologies to drive a true relationship with the guest.

We need to embrace the innovative technologies that surround us, not to cut costs, but to eliminate the friction between hospitality professionals striving to deliver exceptional service and guests seeking the very best our industry has to offer.

HYB

Creating Atmosphere: Design, AI, and the Human Experience of Hospitality

Mid-Stay

James "Eightch" Watson
Designer & Creative Director, FAKE MOON

FAKE MOON

James Watson argues that AI's most promising role in hospitality design is not to generate atmospheres autonomously, but to give human designers the precision and responsiveness needed to make spaces that genuinely breathe — adapting in real time to occupancy, mood, and moment. The risk, he warns, is not that AI replaces designers, but that without strong human vision guiding it, it flattens the industry into an algorithmically pleasant, characterless sameness.

CREATING ATMOSPHERE: DESIGN, AI, AND THE HUMAN EXPERIENCE OF HOSPITALITY

There is a moment, familiar to anyone who has ever walked into a well-designed space, when your attention and focus become more acutely attuned to your surroundings: the air feels different. Light falls on objects at a particular angle and with just the right intensity. The music reaches your ears at exactly the right volume. Everything in its right place. The overall effect is often hard to describe, but one thing's for sure: the experience is well designed and very intentional. This is ATMOSPHERE.

Designers create the invisible architecture that shapes how guests feel in an environment before a single word has even been exchanged. For most of my professional career, creating this sense of impact has been central to everything I do. From soundscapes to product design and artworks. I rely just as heavily on my instincts as I do my experiences and expertise, but now Artificial Intelligence has entered the chat, not to replace me, but to make the process of design more dynamic, responsive, and, at its best, genuinely interested in improving the end results of each project through an increased attention to detail.

In my early twenties, I began working with high-profile hotels and resorts in Las Vegas, and one thing I noticed was that, despite being in such a data-rich industry, the information was rarely used to develop the spaces' atmospheres. More specifically, it was difficult to use data to create meaningful design work. A hotel, casino, or resort might know whether a guest preferred a lower floor, whether they ordered room service after midnight, or whether they were traveling for business or pleasure, but did it really tailor the experience to each new visitor? Not really...but with the emergence of AI and integrated new technologies, that's all about to change.

In 2019, while walking through a property on the Las Vegas Strip, I noticed that the playlist on a Tuesday afternoon was the same as the musical playlist on the following Saturday night. Additionally, lighting in the lobby was either adjusted on a timer or by a front-desk manager who, in many cases, probably had other, more important things to worry about, but it got me thinking, what if I could help set the new standard as a designer through specific automations of both visual and sonic layers throughout the resort?

Fast forward only a few years, and we're finally able to talk about how these changes to atmospheric design parameters can be manipulated by connecting pools of data to the sensory environments in real time.

I used to envision how machine learning would analyze occupancy, weather, time of day, and year, while attaching profiles of guests to real-time changes, but in 2022, I started working with companies that are taking that vision even further by configuring biometric proxies such as crowd noise levels and other physical inputs, and autonomously adjusting the sonic and visual conditions of a space. The result is an atmosphere that breathes and responds to what is actually happening rather than what was programmed months or even years ago, back when the system was originally installed.

As a designer, I am inspired by these developments, and I want to go well beyond the current limitations of automation. I want to be able to reach into the future with AI to analyze the acoustic signature of a space, optimize song selection on the fly, and adjust the equalization, tempo, and energy of the music in response to measured ambient reflectivity within a room. Imagine a dining room filling up, and the conversation rising. The system could incrementally increase or decrease volume to maintain intelligibility without tipping past a point where guests strain to hear each other. As the room empties, Ai can soften and slow the tempo, signaling, almost subliminally, a shift in the evening's mood.

It is important to note, however, that while AI adds the ability to manage these effects with granularity, precision, and responsiveness that human operators cannot realistically sustain, such advances often come with significant tension. The more precisely an atmosphere is engineered, the more legitimate the question becomes: Who are these experiences being engineered for and to what end? If every hotel group uses the same AI platform to generate its sonic and visual environments, trained on the same data and optimized for the same engagement metrics, the result could be a global hospitality landscape that is algorithmically pleasant but thoroughly devoid of character.

Consider, for a moment, the current trends leading towards homogenization in global hospitality, which has already advanced through the expansion of international brands and the dominance of popular design languages. Imagine, then, if a lighting scheme were chosen by someone who had spent only two weeks in the space before touching a dimmer. These are the types of scenarios that have repercussions that no optimization function currently accounts for. Issues, both seen and unseen, might continue to accelerate as AI tools are trained on the same aesthetic conclusions, spreading across thousands of properties worldwide.

As such, the designer who employs AI to visualize, model, and create alternatives to an original concept or theme will not be replaced by the technology, but instead, be amplified by it. Through the utilization of emerging AI technologies, the human mind will be more readily available to focus on higher-level tasks, giving the designer and artist of the future an increased freedom to explore any number of creative possibilities, but even then, each project will still undoubtedly require taste, sensibility, and careful discerning judgment.

Design, then, at its most impactful, clearly communicates that actual human beings cared enough to make specific choices in a specific setting. Design is considered, and AI augments that special care without substituting for it.

As I see it, the most promising applications of AI treat the technology not as an autonomous decorator, but rather as an instrument for extending human creativity and ability.

In the future, responses to the human condition will be paramount to AI's interaction and development. Static designs, however brilliant, cannot account for the fact that a space is experienced differently by different people with different histories and different needs. The same dining room that feels intimate and warm at eight in the evening can feel harsh and exposed at noon. The lobby, humming with shimmering energy on a Friday afternoon, can feel bleak, institutional, and colorless on a Monday morning.

Here, environmental psychology can confirm what good designers already know intuitively, that color and shape can affect visitor pace and mood, volume affects perceived crowding and excitement, and genre carries powerful associations that either reinforce or undermine a brand's intended identity. A spa that plays aggressive electronic music, however briefly, has failed its mission. A cocktail bar that uses bright white LED's on a Friday evening has miscalculated something fundamental, and not just in terms of design, but as an oversight of expectation.

Eventually, more sophisticated applications will identify blind spots in the system and will layer in analytical data appropriately. A boutique hotel that knows its current guests might skew slightly toward youthful travelers from a particular region and can weight its musical playlists accordingly, not to stereotype but to create a sense of recognition where the message is clear... "We want you here."

Interestingly, these current and future developments in AI do present us with a new kind of collaborator. One whose possibilities and risks are worth taking seriously, but the best designers understand that beauty is a function of aesthetics and will allow AI to perform a very special type of magic that extends beyond the simple principles of form and function, and instead will attempt to gain access to our psychological, emotional, and behavioral depths.

As such, a well-proportioned room reduces anxiety. A considered view, whether that of a garden, a cityscape, or a carefully illuminated work of art, gives the eye somewhere to rest and the mind permission to relax. Light that shifts connects guests to the circadian rhythms of the natural world, even deep inside a building. These are not sentimental observations, but rather findings from environmental psychology replicated across decades of research.

Beauty, then, is not just decorative. It is the means by which a space tells its guests that they are important. That their comfort, their pleasure, and their feelings have been carefully examined. AI becomes interesting in this context not when it autonomously generates aesthetics, but when it helps human designers think more holistically, execute more precisely, and respond more dynamically to what guests actually wish to experience.

At the center of the industry's most enduring properties is a combination of both innovation and human interest. These are the destinations that guests return to, not because the beds are necessarily the most comfortable or the menu is the most technically accomplished, but rather because the place has a quality of soul.

These locations are almost invariably the product of strong human vision. Beauty that moves between people tends to come from a place of passion, transmitted through a specific person's perspective and shaped by a collection of encounters spanning both time and space.

Again, to be clear, AI is NOT a replacement for the designer but rather an extension of design tools and philosophies aimed at improving the grand design. In the end, the human experience in any environment turns on a few very simple questions. Did someone care enough to create this? Did a real person, or more likely, many real people, think carefully about what this moment means? This room, this music, this table setting? What does this moment in this atmosphere mean to any one guest?

AI does not immediately aim to answer those questions, but it can create the conditions in which human care is better expressed, more precisely realized, and more consistently delivered, which I believe is meaningful. In 2026 and in the years that follow, I am excited to see how AI is used to enhance the world around us. I believe that those who will perform best are quickly learning that the technology is only as good as the human vision that guides it.

Great design, then, is far more than just a collection of visual and auditory cues, but rather, it is a considered language that shapes our memories, influences our emotional states, and can help determine whether a guest feels truly welcomed or merely processed. When applied thoughtfully, AI offers us the possibility of atmospheres and environments that are not simply designed, but created to come alive through deep human connection! In the end, what a guest remembers will not be the algorithm but rather how they felt about the experience and the memories that they take home with them long after check out.

HYB

The Biggest Opportunity for Longevity Amenities at Hotels Is in the Guestroom

Mid-Stay

Adam Mogelonsky
Partner, Hotel Mogel Consulting Limited

Adam Mogelonsky makes the case that the longevity revolution is no longer a luxury niche but a structural shift in guest expectations and that the most overlooked opportunity lies not in spas or fitness centers, but in the guestroom itself. For time-poor travelers who rarely make it to hotel amenities, the room is the only wellness touchpoint that reaches everyone.

The longevity revolution represents a 'structural shift' in how travelers source their hotels. There's no better way to describe it as the core human demand for maintaining or improving one's health comes to pervade the lives of every traveler across every segment.

That's the grandiose 'why'. Without getting into the CAGR of wellness, consider, for instance, how much biohacking and longevity have grown to become table stakes. They were once niche, now everyone brand is getting in on it (albeit with some wellwashing at play). This is happening at the same time as scientific knowledge around aging, recovery, sleep and metabolic health is rapidly compounding, so much so that our total medical knowledge is doubling every three years (read: AlphaFold).

All these new findings are inevitably and inexhaustibly filtering into consumer awareness at an unprecedented pace. A mantra I often say at this point: "As one does at home, one will expect at their chosen accommodations."

What this means is that guests are becoming highly informed participants in their own wellbeing, and they increasingly expect the environments they inhabit – even if only temporarily – to support that goal. We see this in luxury and ultraluxury which all but demand huge wellness footprints. That will eventually trickle down the chain-scale.

This shift is also being amplified by 'democratization' – this being a fancy word for deflationary forces due to business competitiveness that will drive, as economists say, more 'induced demand' for longevity at hotels. Namely, tools and practices that were once reserved for elite wellness clinics or destination spas are now accessible, affordable and scalable for upscale, midscale or even economy brands.

As an example, consider red light therapy (RLT). There's now plenty of evidence to support its health benefits, as well as a ton of suppliers for mats, wands, ballcaps, wall plates and other fun doodads at a fraction of the price nearly five years ago. This same sense of democratization applies to wearable sleep trackers, functional nutrition products and the equipment to aid in recovery modalities.

Where is this all going? The barrier to enter the longevity market has dropped, but that also stiffens competition.

Therein, when positioning your hotel brand to address the longevity revolution and the demand for wellness, one first principle that often gets overlooked is time. Most travelers aren't solely traveling for wellness or medical tourism.

Most are attending conferences, closing business deals, exploring a destination, celebrating weddings or managing any number of other dense itineraries. The intention to stay healthy is there, but the capacity to carve out hours for a treatment at the spa or a gym session often is not.

This is the opportunity. If we know that time is the limiting factor then we have to start with the place where guests find themselves in-between their ever-hectic schedules: within the confines of their guestroom, suite or villa.

Thus, elements like sleep quality, air purity, nutritional options in the minibar and opportunities for recovery are now decision drivers alongside location and price. This will soon apply across segments. While luxury travelers may articulate it more explicitly like making a RLT face mask a brand standard, other brand further down the chain-scale have carved out a niche by putting a Swedish ladder and other exercise gear in the room.

For hotel operators, this represents both a defensive and offensive strategy. Defensively, integrating wellness protects brand relevance in a market where expectations are rising. Offensively, it can mean an ADR bump, new room categories, ancillary revenue and direct channel uplift.

Wellness is also a play for drastically higher CLV. After all, guests that are pursuing longevity are more likely to live longer. Nowadays, we have enough evidence to also correlate health to cognitive power (and to a lesser degree, emotional intelligence), wherein cognition is associated with greater wealth potential. That is to say, health really is wealth! If you take care of your body and your mind, you will be more likely to gain financial wellbeing (read: wealthspan).

The daunting problem is that wellness is quite ambiguous. It can be deployed anywhere and elsewhere. My push for you, as is clear from the title, is to focus on in-the-room longevity amenities means touching every guest, no matter how much free time they have. While getting into the technical design details is a service I help hotels solve, you start by looking several levels higher – what outcomes do guests want from their in-room health-boosting amenities?

Think in terms of:

- Better sleep and mood
- Cognitive enhancement for work ahead
- Decompressing after a long day's work
- Snacks that promote weight maintenance
- Exercise for mobility and injury reduction
- Wellness techniques that promote moment of joy

Designing this space through a longevity lens unlocks a universally accessible form of wellness that does not require incremental time investment from the guest. These can be deployed broadly or in a modular, phased manner.

Some specific items to start the investigation include:

- Advanced mattress systems
- Biophilic design
- Blackout curtains
- Soundproofing
- Circadian lighting
- HEPA filtration
- Low-VOC materials (volatile organic compounds)
- Supplements
- Foam rollers
- Massage balls
- Yoga mats
- Infrared or PEMF mats
- Herbal teas

That's just a tease. There's a ton more that can be inscribed once you've decided upon the desired outcomes to then fit a 'theme' to the wellness program.

Next, from outcome and theme to specific implementation, you must go through with a business model. Are these enhancements positioned as part of a standard room offering, a premium wellness category or an à la carte upsell? How do they reflect and interact with wellness amenities across the property?

Each approach has implications for pricing strategy and guest segmentation. Bundled wellness rooms can justify meaningful ADR bumps, particularly when supported by clear storytelling and tangible benefits. Alternatively, modular add-ons – sleep kits, recovery packages, upgraded minibars and so on – allow for incremental revenue without broad capital deployment (read: tearing down walls amidst inflationary construction costs).

After the modeling comes budgeting and specifications. The capex should prioritize high-impact, durable elements such as bedding, air systems and soundproofing. Operational expenditures can then tack on consumables and replaceable items like teas, supplements, gym equipment and minibar stock.

Make no mistake: within these key steps (outcomes, theme, modeling, budgeting and rollout) are a mountain of decisions about program specifications, pricing, suppliers, training and merchandizing. To end off, I would emphasize that because this is big business, every hotel brand is already looking to get in on the game. Hence, the only way to stand apart and give your longevity programming the financial longevity it needs is to go through the process of integrated design. It can't feel slapped together or it will fail.

All told, though, repositioning to meet the 'health is the new wealth' crowd may be just the ticket your hotel needs to usher in a new era of profitability and resilience against so much uncertainty in the world nowadays. Your hotel may not have a spa or enjoy to build an elaborate gym, but every hotel guest is paying you for a room, so that's where you should probably start down this journey.

HYB

Why AI in Hospitality Is Really About Human Sustainability

Mid-Stay

Davide Bernasconi
Co-Founder & COO, Hoxell

Davide Bernasconi reframes the AI conversation in hospitality around a problem the industry rarely names directly: operational hypercomplexity. As hotels become more digitally interconnected, the cognitive load placed on staff has quietly become unsustainable — and the most important thing AI can do is not replace people, but give them their cognitive bandwidth back.

The true invisible cost of hospitality is no longer limited to recruitment, turnover, or rising operational expenses. Increasingly, the most significant pressure facing hotel organizations arises from the growing cognitive complexity of modern operational environments, which are simultaneously becoming more digital, more interconnected, more data-intensive, and more dependent on continuous human adaptation than ever before.

Over the last decade, hospitality has undergone a profound technological acceleration. Property Management Systems evolved into interconnected operational ecosystems. Revenue management became algorithmic. Guest communication is fragmented across dozens of digital touchpoints. Marketing shifted toward data-driven personalization. Maintenance became predictive. Reporting became increasingly automated. Artificial intelligence entered customer support, operational coordination, forecasting, reputation management, and commercial strategy.

At the same time, guest expectations continued evolving toward immediacy, personalization, responsiveness, and omnichannel accessibility.

The result is an industry that now operates through a level of informational density and operational interdependence that would have been almost unimaginable only fifteen years ago.

And yet, despite this technological sophistication, many hotels still rely on organizational structures designed for a far simpler operational world.

This contradiction sits at the center of the modern hospitality crisis.

For years, the industry framed its challenges primarily through the lens of labor shortages and talent acquisition. Recruitment difficulties, post-pandemic workforce instability, rising wage pressure, and declining staff retention dominated the conversation. While all of these dynamics remain important, they often obscure a deeper structural issue that receives far less attention: the operational environments themselves have become extraordinarily demanding for the humans expected to navigate them every day.

Every new software integration, every operational dashboard, every digital workflow, every communication platform, every automated reporting layer, every AI assistant, and every additional standard introduced into hotel operations increases the volume of information that teams must continuously interpret, prioritize, process, and operationalize in real time.

Hospitality is gradually evolving into an operational intelligence industry whose complexity increasingly resembles that of logistics, healthcare, or aviation, while still maintaining the emotional expectations traditionally associated with human-centered service.

This transformation becomes particularly visible inside hotel operations.

A modern hotel no longer functions through isolated departments operating independently. Instead, it behaves more like a continuously synchronized digital ecosystem composed of PMS infrastructures, CRS systems, revenue management platforms, CRM environments, guest messaging interfaces, maintenance software, housekeeping optimization systems, energy management tools, mobile applications, digital payment gateways, AI-powered analytics, and predictive operational engines that constantly exchange information with one another.

Within this environment, staff members are expected not only to execute operational tasks but also to continuously interpret dynamic streams of information generated across multiple systems simultaneously.

A front office employee today manages far more than arrivals and departures. That individual navigates OTA extranets, messaging applications, AI-generated guest suggestions, upselling prompts, loyalty systems, digital payment flows, chatbot escalations, review management platforms, and omnichannel communication ecosystems where guest expectations unfold in real time across email, WhatsApp, SMS, mobile applications, and conversational interfaces.

Housekeeping teams increasingly interact with mobile task assignment platforms, digital room-status systems, predictive turnaround sequencing, multilingual operational workflows, and AI-assisted prioritization tools that dynamically reorganize tasks based on occupancy fluctuations, maintenance requirements, and guest behavior patterns.

Revenue managers no longer simply analyze spreadsheets. They supervise forecasting engines, machine-learning recommendations, behavioral segmentation models, predictive pricing systems, and demand signals generated by increasingly opaque algorithmic infrastructures.

Marketing teams are entering an entirely new paradigm in which visibility is no longer determined exclusively by traditional search engines but increasingly by conversational AI systems, generative discovery environments, recommendation algorithms, and answer engines, capable of reshaping how travelers discover hospitality brands online.

Even maintenance departments are transitioning toward predictive operational infrastructures that anticipate technical failures before they occur, using machine learning models trained on historical equipment behavior and operational anomalies.

What the industry is experiencing, therefore, is not merely digitization.

It is the emergence of operational hypercomplexity.

And operational hypercomplexity generates a hidden organizational cost that manifests primarily through cognitive overload.

This distinction is critical because complexity behaves differently from traditional operational pressure. Financial pressure can often be measured directly. Staffing shortages are visible. Occupancy fluctuations are quantifiable. Cognitive overload, by contrast, accumulates silently across thousands of micro-interactions, interruptions, fragmented workflows, duplicated communications, unclear priorities, disconnected systems, and continuous informational switching.

Over time, organizations begin consuming enormous quantities of invisible human energy simply maintaining operational continuity.

This dynamic helps explain why many hospitality organizations experience burnout, declining retention, operational inconsistency, and rising psychological fatigue even after investing heavily in digital transformation initiatives designed specifically to improve efficiency.

The paradox is that technology introduced to simplify operations frequently increases cognitive pressure when implemented without sufficient operational orchestration.

This is one of the central misunderstandings surrounding artificial intelligence in hospitality today.

Public discussions around AI often fluctuate between two simplistic narratives. On one side, AI is described as a replacement mechanism capable of automating human labor entirely. On the other hand, it is presented as a generic productivity tool designed to accelerate existing operational processes.

Neither perspective fully captures the structural transformation currently taking place.

The most significant impact of artificial intelligence inside hospitality is not replacement.

It is the redistribution of operational cognition.

Artificial intelligence fundamentally changes how knowledge is stored, interpreted, accessed, activated, prioritized, and operationalized across organizations. The strategic shift concerns the architecture of decision-making itself.

For decades, hotels relied heavily on tacit operational knowledge held by experienced employees. Operational continuity often survived through long-term staff members who internally carried procedures, exceptions, escalation paths, guest preferences, workaround solutions, departmental coordination habits, and informal organizational memory accumulated over the years.

Many hospitality operations were never truly systematized.

They were humanly memorized.

AI transforms this dynamic because operational knowledge can now become contextual, searchable, conversational, predictive, and dynamically accessible in real time.

This is precisely why conversational AI and predictive reporting represent one of the most important operational developments currently emerging inside hospitality technology ecosystems.

Traditional reporting infrastructures required managers to navigate dashboards, extract data manually, interpret analytical layers independently, and convert raw information into operational decisions through significant cognitive effort.

Conversational AI changes the interface entirely.

Instead of requiring humans to adapt themselves to increasingly technical analytical systems, analytical systems increasingly adapt themselves to human language and operational intent.

A department head can ask why turnaround times increased during a specific occupancy period and receive contextual operational analysis generated through data correlation across staffing levels, maintenance interventions, occupancy density, guest requests, and historical operational patterns.

A maintenance manager can identify recurring technical anomalies before failures become visible to guests.

A revenue leader can explore pricing inconsistencies conversationally without manually constructing complex analytical queries.

A general manager can identify operational bottlenecks across departments through natural language interaction rather than fragmented dashboard navigation.

The interface stops behaving purely as software.

It starts functioning as cognitive infrastructure.

This evolution matters because hospitality organizations are approaching a threshold where the volume and velocity of operational information exceed normal human processing capacity.

Hotels generate enormous quantities of microdata continuously. Guest behavior patterns, booking windows, room turnaround timing, maintenance interventions, energy consumption, staffing productivity, communication flows, review sentiment, ancillary spending behavior, occupancy trends, operational anomalies, and demand fluctuations collectively produce informational ecosystems too dense for purely human interpretation.

Artificial intelligence becomes strategically valuable because it transforms overwhelming informational density into operational clarity.

However, this only happens when AI is implemented as a cognitive support infrastructure rather than a technological theater.

Many organizations currently approach artificial intelligence primarily as an automation layer. The consequence is often the creation of additional operational complexity disguised as innovation.

Hospitality does not fundamentally require more interfaces, more dashboards, or more fragmented technological layers.

It requires operational coherence.

The most effective AI systems are often the least visible ones because they integrate naturally into operational flows rather than requiring continuous behavioral adaptation from staff.

The highest-performing technological infrastructures are often those that quietly reduce ambiguity, simplify communication, accelerate coordination, improve prioritization, eliminate information fragmentation, and allow human teams to focus on dimensions of hospitality that genuinely require emotional intelligence, interpersonal sensitivity, contextual judgment, creativity, anticipation, and empathy.

This is precisely where the Human-in-the-Loop model becomes strategically significant.

The future of hospitality will likely operate through hybrid cognitive ecosystems where predictive systems, automation layers, conversational AI, and human supervision coexist inside continuously adaptive operational environments.

Within these ecosystems, artificial intelligence manages informational complexity while humans provide contextual interpretation, emotional nuance, ethical judgment, improvisation, relational sensitivity, and experiential quality control.

As automation expands, human capabilities do not disappear.

They become economically differentiated.

Emotional intelligence becomes more valuable.

Attention becomes more valuable.

Contextual judgment becomes more valuable.

Empathy becomes more valuable.

The irony is that artificial intelligence may ultimately reinforce the strategic importance of human hospitality precisely because it reduces the operational chaos that currently prevents many hospitality professionals from consistently expressing those qualities.

When operational friction decreases, humans recover cognitive bandwidth.

And cognitive bandwidth directly influences service quality.

A stressed, overloaded, cognitively fragmented employee struggles to provide emotional presence regardless of training quality or brand standards. By contrast, operational environments characterized by clarity, coordination, predictability, and informational accessibility create the conditions necessary for genuinely human hospitality to emerge more naturally.

This is why the future competitive advantage in hospitality may increasingly depend less on who adopts the most technology and more on who designs the most sustainable relationship among humans, operations, and artificial intelligence.

The organizations that will likely perform best over the next decade are not necessarily those pursuing maximum automation, but those capable of using AI to reduce invisible human friction across increasingly complex operational ecosystems.

Because ultimately, the long-term future of hospitality will not be determined exclusively by technological sophistication.

It will be shaped by the ability to design operational environments where advanced technology and human sustainability coevolve rather than compete.

Let’s Get Rid of the CIO

Mid-Stay

Mark Fancourt
Co-Founder & Principal Consultant, TRAVHOTECH

Mark Fancourt delivers a blunt, experience-backed argument against the industry's growing temptation to hollow out technology leadership in the name of AI efficiency. With 37 years in hospitality and 13 as a CIO, he makes the case that adding AI on top of fragmented, underfunded, and poorly governed tech stacks does not simplify anything — it compounds the chaos, and removing the people who understand the system is precisely the wrong response.

MINDLESS THOUGHTS AND OTHER ANECDOTES ON THE REALITY OF BUSINESS TECHNOLOGY AND LEADERSHIP

The hospitality industry stands at the next precarious crossroads. Our technology journey has seen us navigate Global Distribution Systems (GDS), business applications, interfaces and connectivity, the internet, digital marketplaces, data centers, the cloud, mobile and the mobile workforce, information security, and big data, only to find ourselves at the new crossroads of AI.

But let's be direct: everyone is still wondering what to do with technology. I recently gave a presentation on AI to a group of operational leaders, and the truth of the situation is clear. Nothing has fundamentally changed just because we have another evolutionary layer of technology. We cannot take our hands off the steering wheel, Tesla-style, while we crash and burn.

With that backdrop, let's explore how the industry is currently feeling about these changes. Picture this: let's get rid of the CIO. What happens then, especially if we sidestep these twelve raw realities?

1. THE PRISM OF IGNORANCE

The industry totally underestimates the depth, breadth, complexity, reach, and impact of technology. It is no surprise that most view operations through a narrow prism. If your lens is limited to "guest journeys," you are ignoring the vastness of the real environment. We must account for the intricate data flow between Digital Commerce, Operational Systems, Back-of-House Engines (ERP/Finance/Supply Chain), and the underlying Infrastructure. This isn't a linear path; it is a massive ecosystem where what happens deep in the back-of-house rolls all the way back through the business to impact the guest experience. Business people simply do not have the ability to drive the direction and future of tech. It has proven constantly in this industry that without domain expertise, they are simply guessing and failing.

2. THE LOTTERY APPROACH TO FRAGMENTATION

Let's go for the lottery approach to achieve continued fragmentation! The industry keeps hoping the next shiny object will solve legacy problems without doing the hard work. "Getting it all together," a previous Yearbook theme of mine, has not changed.

Today, the pile of technology is higher, and structure matters more than ever. Strategic governance isn't a bureaucratic burden; it is the orchestration of knowledge to achieve a position of marketplace leadership.

3. THE CALCULATED GLEE OF REMOVING EXPERTISE

The hands are rubbing, and the minds are rolling over with calculated glee. "We can remove even more experienced leadership from hospitality technology?!" This is a massive problem. Removing responsible, skilled technology leadership is not efficient; it is a failure of leadership at all levels. Those who haven't sat in the seat, managing multi-million-dollar global budgets and complex distributions, have no business commenting on how to lead this function.

4. ANSWERS VS. ARCHITECTURE

Getting an answer is not what running technology requires. Leveraging AI to answer a simple support question, rather than using a PABX, a ticket-tracking system, or an educated person, is merely a different technology platform; it is not technology leadership. There is a fundamental difference between using AI to solve business problems and leading technology from a business and enterprise architecture perspective.

5. THE AI "ICING" FALLACY

If your CIO is forced to manage a subpar environment, it's because the organization failed to keep up with its investments. Adding "AI icing" to a broken foundation won't make a difference. An AI-prepared organization is one that has already embraced and deployed all the previous major competitive advantage stages we identified. Anything else is just broadening the chasm for an organization that is fundamentally not ready for the next evolution. There were no shortcuts before, and there are not any now.

6. THE "CHIEF AI OFFICER" DISTRACTION

I know! Let's get a Chief AI Officer! What a great idea to bifurcate the leadership of technology capability in your organization by cutting it in two. It is yet another way to fail quickly. News flash: For the last 25 years, technology has been about business process optimization.

It reminds me of the Six Sigma nonsense we all had to endure in corporate life. Business process is business process, and it has been since the PDCA (Plan-Do-Check-Act) cycle was developed by W. Edwards Deming. Capable technologists are constantly looking to optimize business processes, and AI is simply the next layer that will help us further optimize them.

Bifurcation of technology leadership is not required because of another piece of technology. Real leadership in this space has always been about acting as a Business Technology Architect, designing the business itself through the lens of competitive advantage.

7. THE INTERNAL DEVELOPMENT DELUSION

Wait for it, here comes the flood of internal technology projects because, thanks to AI, "we're all software developers" now. We were finally reaching a point where the industry's largest operators understood that building technology internally is not the best use of resources. Yet, on the verge of the AI age, everyone has decided it's time for internal artificial intelligence technology projects. Who is going to oversee that? Who will make sense of how these sideline initiatives will be handled, versus those built from the ground up with a full understanding of technology design, structure, and management?

Without capable technology leadership, you are just adding to the chaos in an already complex environment.

8. THE GRIFT OF THE "AGENT"

Sideline commentators, speaking from a position of something to gain but without the actual experience, are telling people that, now that they have ripped off others' expertise, "Have we got an agent for you!" They have ingested decades of operational knowledge and are trying to sell it back as a generic tool. While I'm at it, I'll sell you mine. At least it will come from someone who has actually done the job. Just cue that global disclaimer: "AI can make mistakes and may not be accurate."

An AI agent has no neck to wring when the data is confidently wrong, and accountability is questioned.

9. BLURTED THOUGHTS VS. REAL EXECUTION

Things are not getting simpler because you can blurt your latest thought into a prompt. Execution is still key, and you likely have another job that demands your attention and effort. Complexity is not solved by prompts; it is solved by knowledgeable orchestration, commitment, and follow-through. Realizing a result requires an unusual level of passion that a "mindless" algorithm cannot replicate.

10. THE INFRASTRUCTURE TRAP

The industry is stuck in an 'IT' lens of physical infrastructure. We passed the infrastructure age with data centers, and then increasingly moved to the cloud. If you are still viewing tech as cables and hardware rather than business tools for competitive advantage, you need to catch up. Technology is a sovereign business asset that requires a leader who speaks the language of both the boardroom and the "black box."

11. DORMITORY OR HOSPITALITY?

The future of our industry is on the line. Dormitory or people-led human connection and service? Algorithms cannot replicate the authentic warmth of a guest experience or the "magic" of an unscripted moment. We must decide if technology will augment our human teams or create sterile, efficient environments that alienate guests.

It's your call. I'll flip you for it!

12. THE RAW REALITY: YET ANOTHER LAYER

The truth of the situation, distilled to its raw reality, is this: we now have yet another layer of technology. Now we need educated guidance on how to use this new capability alongside the rest of the underlying technology, which continues to play a core role in the industry's business.

Leadership in an AI-centric organization is not about replacing hospitality professionals with a layer of AI agents. It is about having the relevant knowledge to make educated decisions. If you think this evolutionary step allows you to remove responsible technology leadership, you are just finding a new way to further compromise your organization's future.

THE FINAL WORD

I can tell you, after 37 years in the hospitality industry, 30 of them directly involved in technology, 13 of them in the CIO seat, and serving as a strategic consultant, everyone is still asking the same questions they've always been asking. They're asking because they don't know the answers.

On behalf of all the people out there striving to make great technology come to life in this sector, we have a long way to go.

As an industry, we might know very well what's involved in receiving customers at the front desk or in the check-in process. We know very well how to operate the dining room floor. But the one thing we still struggle with as an industry, largely because we have not put the necessary time, energy, and investment into the people, is the delusion that you can let technology go on its own.

If you think it's time to let it go on its own, you will fail.

Knowledge, expertise, and perspective are hard-won platforms used to deliver value back into our industry. They cannot be underestimated. The capability needs to be valued in the same way that we value all other professionals across the diaspora of our industry; there just happen to be a whole lot fewer of us.

If you didn't already have your performance motor vehicle driver in the hot seat, it might be time to see who's available. Don't make the mistake of removing what few technology professionals remain.

AI has only made running technology more complex.

Digital Labour: Rethinking Work in Hospitality

Mid-Stay

Stanislav Ivanov
Founder and Editor-in-Chief, ROBONOMICS: The Journal of the Automated Economy

Stanislav Ivanov reframes the automation debate by shifting the unit of analysis from jobs to tasks — and in doing so, arrives at conclusions that challenge common assumptions. Physical tasks, he argues, are often harder to automate than cognitive ones, which means low-paid housekeepers may be safer from replacement than high-paid marketing managers, and the future of hospitality labour is not fewer people but differently assembled teams of humans and machines.

Technology is changing not only the guest journey but also labour in hospitality. Hospitality managers are no longer deciding only how many employees they need; they are deciding which tasks should be performed by people, software, kiosks, robots, and collaborative teams of humans and autonomous agents. The central managerial question is not whether work will change, because it already has, but how to redesign work so that robots, artificial intelligence and automation technologies improve productivity, service quality and employee wellbeing at the same time.

FROM JOBS TO TASKS

Hospitality jobs are often discussed as if they were indivisible. In reality, every job consists of tasks. Some tasks are cognitive, such as analysing data, answering routine questions, writing marketing copy, or setting prices. Others are physical, such as cleaning a room, delivering a room service order, carrying linen or maintaining equipment. This distinction matters because technologies do not automate entire jobs in one stroke. They automate, augment or transform particular tasks first, and only then affect the job as a whole.

A further nuance is critical. Physical tasks are usually more difficult to automate than cognitive ones. This seems counterintuitive to many managers. Writing a sales contract or determining a room price looks more intellectually demanding for humans than making a bed or cleaning a bathroom. Consequently, a marketing manager is remunerated much more than a housekeeper. Yet, the robot that performs a physical task must also perceive the environment, identify objects, navigate around obstacles and decide how to act in real time. In this sense, physical tasks include cognitive tasks as well, which is why it is easier today to automate much of the work of a high-paid marketing manager than to automate the job of a low-paid housekeeper.

Software applications have become the primary tools for automating cognitive work, while robots are primarily used for specific physical tasks. Hotels already use revenue management systems, marketing automation tools, chatbots, generative AI applications and robotic process automation to handle information-rich activities. At the same time, physical automation remains narrower: vacuum robots, robotic carts, pool-cleaning robots, and room-service delivery robots can assist employees, but only in carefully defined contexts. For hospitality managers, the implication is clear: digital labour does not completely replace human labour. It arrives through the gradual reallocation of tasks between humans and machines.

A task-based perspective provides a more realistic way to think about labour transformation in hotels. Receptionists do not simply “work at reception”; they answer questions, check guests in and out, process payments, issue keys, provide directions, solve problems and handle exceptions. Housekeepers do not simply “clean rooms”; they move items, assess cleanliness, replace linens, note maintenance issues, protect guest belongings, and adapt to the unique condition of each room. Marketing specialists do not simply “market” the hotel services; they analyse data, create content, manage campaigns, respond to online comments and coordinate digital channels.

Once the job is decomposed into tasks, the automation logic becomes easier to understand. Hospitality tasks that are routine, standardised, repetitive and information-based are usually easier to automate. Tasks that depend on perception, dexterity, mobility, empathy, improvisation, or contextual judgement are harder to fully automate at the current level of technological development. This does not mean that the second group will remain untouched. It means that the technologies used there will more often enhance or transform employees rather than replace them entirely.

MAIN EFFECTS OF TECHNOLOGY ON HOSPITALITY WORK

The effects of automation, robotics, and AI on hospitality work at the task level can be grouped into five categories: elimination, substitution, enhancement, transformation, and creation. These effects may happen simultaneously in the same process, which is why the impact of technology is rarely linear.

Elimination occurs when a task disappears altogether. If guests use mobile keys on their phones, the task of issuing and coding physical keycards may be eliminated entirely.

Substitution occurs when the task remains but is performed by technology instead of a human. A chatbot that answers standard guest questions, a kiosk that checks in a guest, or a software tool that produces a first draft of a marketing message all substitute for work previously done by employees.

Enhancement occurs when technology increases employees' productivity. A marketing specialist who uses generative AI to draft campaigns can produce more work in less time, while a hotel employee supported by a delivery robot can serve more rooms without making more corridor trips.

Transformation occurs when the nature of the task changes. A waiter no longer walks the tray to the room; instead, they load a robot, monitor its status, and handle only orders that a robot cannot fulfil. The process still exists, but the employee performs different actions within it.

Creation occurs when entirely new tasks emerge due to technology. Someone has to supervise automated workflows, update chatbot knowledge, validate AI-generated content, coordinate robots, maintain systems and train colleagues to use them. These are genuine additions to work, not merely reworded old tasks.

At the job level, the effects differ slightly. Jobs can be substituted, enhanced, transformed or created. If enough tasks are automated and the remaining ones can be reallocated, a job may disappear. More often, however, jobs in hospitality are being reassembled by reorganising their tasks rather than simply being removed. This is why the future of hospitality labour is not a future without people. It is a future in which all jobs have a strong digital component.

COLLABORATIVE TEAMS OF HUMANS AND MACHINES

The future hotel will not be staffed solely by humans or solely by robots and autonomous agents, although some will be. It will be organised around collaborative teams in which human employees, (humanoid) robots, software systems and virtual autonomous AI agents work together. This is already visible in many hotel functions, even if managers do not yet describe it in those terms. For example, a room service robot does not operate as an independent hotel employee. It depends on the people who prepare the order, load the robot, trigger the delivery process, and act when lift, corridor traffic, or guest behaviour creates a situation requiring human intervention.

A chatbot does not replace the whole guest relations team. It answers standard requests, routes messages and frees employees to deal with more demanding issues. A generative AI system in marketing does not "become the marketing department"; it drafts, suggests and analyses, while humans approve, edit, adapt and take responsibility. Therefore, while many tasks and processes will be automated, human employees will remain in control.

These examples point to a broader managerial shift. Productivity can no longer be measured solely at the individual employee level. It increasingly depends on how well the human-technology team is designed and coordinated. The relevant managerial questions, therefore, change. Instead of asking only, "How many employees are needed?", managers need to ask, "Which team configuration of people and technologies performs this process best?" This shift also changes supervision. Managers will not supervise only people. They will supervise hybrid teams. They will need to assess where automation works reliably, where it creates extra work for humans and friction in the human-agent interaction, where employees need more discretion, and where guests still expect human contact. Digital labour is therefore not only a technological issue. It is an operations management issue.

DIGITAL SKILLS OF HOSPITALITY EMPLOYEES

If hospitality work is becoming hybrid (i.e. human-agent collaboration), employee skills must become hybrid as well. Hospitality employees do not need to become software or robotics engineers, but they do need well-developed digital skills and a basic understanding that some of their co-workers may be (humanoid) robots or virtual autonomous agents. That change in mindset is as important as the technical training itself.

Digital skills in hospitality should be understood broadly. They include basic skills such as using property management systems, mobile applications, dashboards, kiosks, chatbots, and AI tools effectively. But they also include the ability to interpret outputs critically, recognise errors, protect privacy, troubleshoot basic failures and collaborate within digital workflows. For some roles, particularly in marketing and revenue management, work may increasingly focus on orchestrating autonomous agents rather than performing every task manually. A marketing manager may use different AI agents to generate campaign variants, monitor audience responses, draft offers and propose content calendars.

The tasks of the individual AI agents will even be supervised and coordinated by another agent. The human employee evaluates the agents' outputs, aligns them with the brand strategy, corrects mistakes, and decides what should actually be published. In other words, the employee becomes less a producer of outputs and more a conductor of a digital orchestra. Similar developments are likely in revenue management, distribution, guest communications and other processes.

At the same time, social and emotional skills do not lose value in digital labour. They become more important because they form a key comparative advantage of human employees. The high-tech hotel still needs employees who can reassure, empathise, improvise and create a sense of welcome. Therefore, hospitality employees need both digital competence and human sensitivity.

RESISTANCE, ADAPTATION AND EMPLOYEE WELL-BEING

Employee resistance to automation and digitalisation of their work is inevitable. Hotel workers may fear job loss, reduced status, tighter monitoring, deskilling or a gradual devaluation of their work experience. These fears are understandable and should not be dismissed as irrational conservatism. At the same time, resistance can be mitigated. With proper training, transparent communication and visible benefits, employees can become active drivers of the digital transformation of hospitality work. The key is that they must see what automation does for them, not only what it does for the company. If technology removes repetitive paperwork, heavy manual labour, unnecessary corridor trips to deliver room service orders, unsafe cleaning tasks or night-time routine work, employees may quickly recognise its value and positive impacts on their wellbeing.

CONCLUSION

The transformation of hospitality labour through robots, artificial intelligence and automation technologies is not a distant scenario. It is an operational agenda to prepare hotels for the forthcoming technological tsunami of very smart, capable humanoid robots and virtual, autonomous AI agents.

The most effective starting point for hoteliers is to map the processes in their properties and break them into tasks. Only then could they redesign the processes and identify which tasks should be eliminated, which should be implemented by humans, which by agents and which by human-agent collaborative teams. New role descriptions, performance metrics, and training systems are an integral part of this digital transformation. Some departments will become smaller, some more productive, and some more digital. This requires an active managerial approach to organisational design rather than passive adaptation.

Digital labour is therefore not about replacing people with machines. It is about how humans, robots and autonomous agents will increasingly operate in collaborative teams to create the core of hotel service: hospitality.

HYB

Post-Stay, Pre-Loss: Rethinking Travel Agent and OTA Commission Reconciliation

Post-Stay

Sean Anderson
Chief Revenue Officer, RobosizeME

Sean Anderson makes the unglamorous but financially compelling case that post-stay commission reconciliation is one of the most overlooked revenue levers in hospitality. Using the example of a 400-property European group quietly overpaying up to $40,000 a month simply because no one was checking, he argues that the post-stay funnel deserves the same operational discipline as guest acquisition — because the money is already earned, and much of it is silently leaking away.

We recently analysed a European hotel group with more than 400 properties. Because they were short on staff, their policy was simple: if the monthly Booking.com invoice was within ±1% of what they expected, they paid it without a detailed check. At their volume, that "tolerance band" translated into an estimated 35,000 to 40,000 US dollars in extra commission payments every month.

That's the blind spot.

We invest heavily in acquisition, revenue management, and on-property experience. But once the guest checks out, a second, quieter journey begins: commissions, virtual cards, and partner invoices work their way through our systems. If that "post-stay" funnel is not deliberately designed, it becomes a slow leak in the P&L.

THE POST-STAY FUNNEL: WHAT REALLY HAPPENS AFTER CHECK-OUT

Think of each third-party reservation as still being in a funnel after departure.

In an ideal world:

1. The guest checks out; the PMS locks in the true stay dates, status, and rate code.
2. The OTA or travel agent submits its commission claim or triggers a virtual card payment.
3. The hotel validates the claim against actual stay data and the agreed-upon rules.
4. Any discrepancies are resolved within the OTA's time window; the correct amount is paid.

In reality, the path is messier.

A three-night booking becomes two, but the OTA still claims commission on three. A non-commissionable corporate rate slips into a claim file. A no-show is marked as "stayed" in one system and "cancelled" in another. A VCC expires before anyone notices the balance was never collected.

Individually, these look like rounding errors. At scale, they define the true profitability of your OTA and agency business.

WHY THE PROCESS BREAKS (IT'S STRUCTURAL)

The leakage is rarely caused by lazy people. It is baked into how the work is set up:

- Fragmented data. Stay data lives in the PMS. Commission claims live in extranets, processors, email attachments, and spreadsheets. No single source of truth.
- Unforgiving time windows. Some OTAs allow 48 hours after check-out to dispute discrepancies. With hundreds of departures a day, a human-driven audit cannot keep up.
- Exception-heavy rules. Groups, corporate contracts, consortia programmes, net rates, "pay at hotel" bookings: all behave differently. The rules sit partly in SOPs, mostly in people's heads.
- Fatiguing work. Manually keying reservation numbers, dates, and amounts for hours at a time guarantees a 1–2% error rate. Those small percentages are pure margin.

Over time, many teams accept a certain level of loss as "the cost of doing business with intermediaries" and stop attempting full reconciliation.

DESIGNING A DELIBERATE POST-STAY COMMISSION JOURNEY

Instead, treat post-stay commission handling with the same discipline you apply to guest experience or your direct booking funnel.

Four explicit milestones for every third-party stay help:

1. Data integrity locked. Within 24 hours of check-out, the PMS accurately reflects length of stay, rate code, and status (stayed, no-show, cancellation).
2. Commission eligibility tagged. Each reservation is classified (OTA, retail agency, consortia, wholesale, non-commissionable) and linked to the correct payment path (VCC, direct bill, commission processor).
3. Claim matched or challenged. When a claim arrives, it is matched against PMS data. Exact matches are queued for payment; mismatches are flagged while you're still within the dispute window.
4. Cash collected and auditable. VCCs are charged, agency invoices are issued, payments are received, and everything can be traced back to specific stays.

Once you see the process this way, you can ask: which steps really require human judgment, and which are just structured data work?

FOUR JOBS AUTOMATION SHOULD DO FOR YOU

When we build automated reconciliation flows for hotels, we focus on four core jobs. The labels don't matter; the outcomes do.

1. COMMISSION VERIFICATION
First: compare what partners say you owe with what actually happened in your PMS.

Daily, extract departed reservations from the PMS with stay dates, rate codes, booking sources, and travel agent profiles. On a regular cadence, pull commission files from OTA extranets or processors and line them up reservation by reservation.

For each claim, check: did the guest actually stay those nights, at that rate, on that channel, under a commissionable code? If yes, confirm the exact amount owed. If no, flag the discrepancy and prepare the data you need to dispute it.

2. DISCREPANCY FLAGGING
Finance teams don't need more raw data; they need a clear view of the exceptions.

A good process does not dump every reservation into someone's inbox. It highlights only cases where something doesn't add up: mismatched stay dates, "cancelled" in the PMS but "stayed" in the OTA, a group where only part of the block is commissionable, and so on.

Those edge cases should appear in one central place, with enough context to act: reservation number, partner reference, what's different, and how much is at stake. Humans then spend their time investigating real issues, not scanning rows that already match.

3. VCC RECONCILIATION
Virtual credit cards are a quiet but meaningful source of leakage.

An OTA issues a VCC for room and tax, valid only around check-in. If no one charges it in time, or if the amount charged doesn't match the booking, the difference may never be collected.

An automated flow can log into your PMS daily, identify yesterday's OTA check-outs paid via VCC, compare expected amounts to what was actually charged, and flag gaps. For uncharged cards still within their validity window, it routes them for immediate action before they expire.

If VCC bookings represent a large share of your OTA volume, losing 1–2% of that revenue simply because no one had time to chase it is completely avoidable.

4. AUTOMATED PARTNER INVOICING
Many travel partners still work on a "pay by invoice" basis. After check-out, the hotel must gather stay data, apply the commission rules, generate an invoice, and send it.

Because this is repetitive and time-sensitive, it's perfect for automation. An automated process pulls the relevant data from the PMS daily, applies your billing logic, generates invoices in the right format, and sends them or drops them into your approval workflow.

Invoices go out faster, which helps cash flow, and finance can focus on edge cases instead of re-keying data.

THE ECONOMICS: HOW SMALL PERCENTAGES BECOME BIG NUMBERS

The financial impact is easy to underestimate because the percentages sound small.

Imagine a portfolio that generates €50 million a year in OTA-sourced room revenue. If commission costs on that slice are around 20%, you're paying €10 million in commissions.

Now assume that, between overclaimed nights, misclassified non-commissionable stays, VCC leakage, and simple error, only 1% of those payments are higher than they should be, or never collected when they should be. That is €100,000 a year in pure margin that disappears without adding a single room night.

At 2%, the number doubles. And this does not include the labour hours consumed by manual reconciliation and chasing exceptions.

At that point, commission control stops being "admin" and becomes a direct revenue lever.

PAYING ACCURATELY AS A RELATIONSHIP STRATEGY

There is also the signal you send to distribution partners.

From an OTA or agency's perspective, a hotel is both a place where their clients stay and a financial counterparty. They remember two things: how happy their travellers are, and how easy it is to get properly paid.

Under-paying legitimate commissions damages trust and can push partners to steer demand elsewhere. Over-paying "to keep things simple" avoids friction in the moment, but you're subsidising partners beyond what contracts require.

Both problems have the same root cause: a process that cannot reliably say, for each stay, "this is exactly what is owed, and here is why."

Hotels that invest in timely, accurate, auditable post-stay processes earn a different reputation. Conversations with partners are grounded in data instead of feelings. Disputes are faster and more objective. Payment cycles are predictable. Over time, that reliability becomes a real competitive advantage.

FROM BACKLOG TO CONTROL: WHERE TO START

If you're looking at a large reconciliation backlog, this can sound overwhelming. You don't need a "big bang" transformation to see gains.

Three practical starting moves:

1. Stabilise PMS data within 24 hours. Make sure length of stay, status, and rate codes are correct the day after departure. If that data is wrong, everything downstream is guesswork.
2. Pick one or two high-impact channels. Focus first where commission percentages are highest or dispute windows are tightest: typically top OTAs, VCC flows, and one or two major agency partners. Get those journeys right before expanding.
3. Automate retrieval and matching first. Automatically extracting departed stays, retrieving partner reports, and doing basic one-to-one matching removes huge manual effort and makes discrepancies visible.

Once those foundations exist, adding additional rules, dashboards, and approval workflows is far easier.

TREAT POST-STAY AS A REVENUE LEVER, NOT AN AFTERTHOUGHT

When we talk about the “post-stay” stage, we usually think about surveys, reviews, loyalty enrolment, and remarketing. All of that matters. But for many hotels, the fastest, most reliable gains are hiding in a different corner of the post-stay funnel: how commissions and payments are reconciled.

Commission reconciliation will never be glamorous. No guest will ever thank you for it at check-out. Yet it is one of the few areas where you can simultaneously:

- Protect margin without raising prices
- Improve partner relationships without higher incentives
- Free up skilled finance staff for higher-value work

In a world where distribution costs are rising and attention is expensive, we cannot afford to ignore money we have already earned.

Designing the post-stay funnel with the same care we apply to acquisition and on-property experience is no longer optional. It is the next logical step in running a hotel that is not just busy, but genuinely profitable.

HYB

How Brand Identity Evolves in an AI World

Post-Stay

Martin Soler
Partner, Soler & Associates

soler
& associates

Martin Soler argues that AI does not threaten brand identity by making bad content — it threatens it by making an overwhelming volume of acceptable content, which over time erodes the distinctiveness that makes a brand worth remembering. In a world of infinite iteration, he contends, consistency and taste become scarcer and therefore more valuable, not less.

There is a growing belief that AI will make marketing easier. It sounds right. You upload the guidelines, define the tone of voice, add the logo, set the colors, train your AI, and suddenly every campaign, banner, email, landing page, social post, display ad, sales deck, and slightly desperate Black Friday asset comes out perfectly on brand. That is the theory. In practice, the problems appear quickly.

AI is very good at quantity. It is very good at iteration. It can give you 50 headlines, 10 image directions, 20 email subject lines, 5 versions of a campaign concept, and a surprisingly confident explanation of why all of them are brilliant. This is useful for inspiration, but brand identity is not built by variation. Brand identity is built by repetition, consistency, and distribution.

David Ogilvy put it very well: *"Every advertisement is part of the long-term investment in the personality of the brand."* That line becomes much more important in the AI era. Every output is not just content. It is a deposit into, or a withdrawal from, the most valuable investment any company makes: the brand. A strange image, a slightly wrong font, an *almost* correct logo (to borrow Simone's observation on uncanniness from the foreword), a tone that sounds like everyone else's, all of these may seem like small losses. Yet they compound over time. Slowly, almost imperceptibly, the brand begins to leak.

That is brand leakage: the slow movement of value, reputation, recognition, or customers away from the company's control. Lomar Dictionary defines it as *"when part of a brand's value, reputation, or customers unintentionally moves away from the company's control, often resulting in lost revenue or weaker brand influence."*

This is where AI creates a strange contradiction. It gives marketers the ability to produce more, faster, and cheaper. Sir Martin Sorrell has argued that the advertising model is changing quickly and that those who harness AI, scale creativity, and deliver faster will win. This is totally correct. But speed is not what builds a brand. Speed helps distribution, testing, and production. It matters, and I'll come back to that later. But speed without control is just a very efficient way to create mess.

And building a brand is one of those domains where *"almost right"* can still be wrong.

A logo that is 95 percent correct is not correct. A colour that is nearly the right blue is not the right blue. A typeface that feels close enough is not close enough if the brand has spent years training the market to recognise something precise. For some businesses and early-stage startups, approximation will be fine. Scrappy is great. A new rental business testing Instagram posts probably does not need a military-grade brand system. But if you're building a hotel or a company, especially one with scale, recognition, and trust attached to its identity, those details matter. And knowing which details matter, and which can safely be ignored, is exactly the kind of taste that AI lacks.

This is why the current wave of AI brand tools is both exciting and a little daunting. Many are being built around brand guardrails. Upload the guidelines. Lock the fonts. Restrict the colour palette. Use approved photography. Add tone rules. Prevent the model from wandering off into *"inspirational corporate nonsense"* mode. They will improve quickly, and they are already useful. But the hard part is not only the rules. The hard part is the system.

A brand guideline is not a brand system. It is a description of a system. And most of the time, it is a very optimistic description. Because real brands do not live in perfect conditions. They live in exceptions, compromises, edge cases, and taste.

Anyone who has worked on a complex rebrand knows this. On paper, everything looks clear. In reality, almost everything is an exception. Someone needs a tiny logo. Someone needs a version for a background that cannot be changed. Someone needs a full-screen mobile splash screen. Someone needs a version that works when a partner puts it next to five other logos. And someone needs a version that does not break when the sales team exports it as a JPEG from a PDF from a presentation from 2019. This is where the brand lives. Not in the beautiful page of the brand book, but in the ugly edge cases.

And AI creates more edge cases than we have ever had, or wanted to even consider.

This is why I think brand identity in an AI world is less of a graphic design problem and more of an operating system problem. The old model was to hire a graphic designer, make a brand bible, use it in campaigns, produce assets, distribute them, and just keep going. The new model is closer to a living machine. There will be constant inputs, constant requests, constant variations, constant exceptions for audiences, platforms, languages, formats, and moments. The question is not whether AI can create more assets. Of course it can. The question is whether the brand can survive the volume.

Bill Bernbach's line feels very relevant here: *"Adapt your techniques to an idea, not an idea to your techniques."* That is exactly the trap with AI. The technique becomes so seductive that it starts leading the brand. Because we can personalize everything, we do. Because we can create something that follows the latest trends, we do. Because we can test every sentence, every image, every colour, every call to action, we do. Eventually, the brand becomes a thousand optimized things, but no vision.

This is probably the biggest risk. Not that AI makes bad content. It will make plenty of good content. The risk is that it makes too much acceptable content.

Acceptable is the problem. Bad content gets rejected. Excellent content gets noticed. Acceptable content gets approved, posted, boosted, versioned, localized, and forgotten.

It fills the feed. It meets the deadline. It passes the brand check, mostly. And slowly, the brand becomes average. My main takeaway from iF Design's 2026 Trends report is that we are entering an age of average, unless we actively resist it.

Social media has already trained us to expect constant novelty. We do not want to see the same ad twenty times anymore. The old repetition model has been weakened. In the past, repetition meant literally repeating the same thing. Same TV spot. Same print campaign. Same outdoor. Same slogan. Same jingle that somehow stayed in your head for three decades, usually against your will. Take a pause here and try to remember: which ad slogan or jingle from the last ten years do you actually remember?

Today, repetition has to work differently. The audience wants freshness, but the brand needs memory. So the challenge is not to repeat the exact same asset. The challenge is to repeat the same identity through different assets. And this is the point of speed that I alluded to above.

Think about Apple's recent launch of the MacBook Neo. The positioning may change (a cheap MacBook?), the campaign idea may change, and even the typeface may change. But it still feels recognizably Apple. The same is or was true of Nike, Louis Vuitton, Rolex, Aman, The Standard, citizenM, and a handful of others that have built real mental availability. You do not need every ad to look identical, but you do need every touchpoint to feel like it came from the same world.

This is where many companies will struggle. They do not really have a brand identity. They have a logo, a colour palette, a website and a few phrases like *"innovative", "human-centred"*, and "seamless experience". Then they ask AI to scale it. But scaling something weak does not make it strong. It just creates more of the same weakness, with a little more randomness each time.

In hospitality, this becomes particularly interesting. Hotels are physical brands. A hotel brand is not only a logo or a website. It is the lobby smell, the staff attitudes, the coffee, the tone of the pre-arrival email, the way the room key looks, the music, the check-in process, the way complaints are handled, and whether the online promise was there in reality. AI can create the content around the brand, but it cannot fake the experience forever. Worse, it might make the gap more obvious.

If the AI-generated marketing becomes more polished than the real product, trust will break. If all the content appears AI-generated, trust will break. We already know what this feels like. A hotel with beautiful photos and an average room. A restaurant with perfect Instagram content and tired service. A SaaS company with a brilliant website and a product that looks like it was assembled during a fire drill. AI will make it easier to polish the promise. But one key metric of a brand is the gap between the promise and the experience.

The brand should sound the same, look the same, and act the same. If the social media is warm and playful, but the customer service email reads like a legal warning, if the website says *"effortless luxury"*, but check-in feels like passport control, if the AI chatbot speaks in a friendly tone but cannot solve anything, all those elements, in no particular order or priority, make the brand.

In Wes Anderson's beautiful film The Grand Budapest Hotel, the GM is the ultimate brand director, ensuring the experience is exactly as he has imagined it. He embodies the brand. It lives in his head. Taste is the filter he applies to every detail. He knows which details matter, because they do not all matter. But AI has no idea which details matter.

The best use of AI in brand identity will probably not be *"make everything"*. It will be *"help us make many things that still feel like us"*. That means the brand system has to become more precise. Not just a PDF guideline, but templates, locked assets, approved components, image rules, motion rules, prompt libraries, examples of what good looks like, examples of what wrong looks like, human approval for critical assets, and a clear distinction between flexible elements and sacred elements.

Campaign headlines can vary. The logo cannot. Social captions can adapt by audience. The brand idea cannot change every Tuesday. Photography can be refreshed. The underlying visual world should not become unrecognisable. AI can create endless branches, but taste matters. What details are important or unimportant, when and why? That's a key part of taste.

This is where I think brand teams will become more important, not less. The boring version of the future says AI replaces brand work. The more realistic version is that AI floods the organization with output, and brand teams become the people who stop the flood from becoming slop. They will need to define the system, train the tools, and approve the exceptions that keep the brand consistent.

Not everything needs to be handcrafted. There are plenty of assets where AI can do the heavy lifting. Size variations, first drafts, localization, background adaptations, email versions, simple display ads, internal templates, social ideas, campaign extensions. Great. Let the machine do the repetitive work.

But the core assets still need intention. The main idea. The campaign thought. The promises behind the system. The things that confirm to the market who you are.

People don't remember variations. They remember repetition and how you made them feel. But without variation, they get bored.

And that is the key point. AI gives us variation. Brand needs repetition. The winners will be the companies that learn how to use AI to create freshness without destroying memory. The losers will be the ones who mistake iteration for presence.

So maybe the future of brand identity is not about being more creative in every asset. It is about being more disciplined in the system. More precise about what must never change. More relaxed about what can. More honest about whether the brand has a real idea at the centre, or only a logo surrounded by fancy buzzwords.

In a world of infinite content, consistency and taste become rarer. And because they become rarer, they become more valuable.

HYB

Beyond Bias: AI and the Reconstruction of Perception

Post-Stay

Rita Jusztina Varga
CEO, RAIZUP

raizup

Rita Jusztina Varga raises an uncomfortable question the industry is only beginning to grapple with: when AI summarizes guest reviews at scale, whose experience actually gets represented? Drawing on her own decade-old stay as a case study, she argues that AI bias in review aggregation systematically amplifies certain voices while quietly erasing others — and that the hospitality industry urgently needs to rethink how it collects, segments, and trusts feedback data.

Guests really start to form their memories of a stay after they leave, and we are not the ones shaping those memories.

Ten years ago, I went to train one of my boutique hotel partners in Switzerland, where I was greeted with a mug that read: "Come as a guest, leave as a friend." That statement set the tone for my whole stay, and they lived up to it, consistently meeting the expectation they'd set. A decade on, it's a business trip I still remember, and I became a "friend for life" — that was my review. On paper, I served as a data point: a solo female business traveler from Hungary, a short length of stay, a direct booking, and a short booking window. For a machine, that is a data point.

For years, I've learned about and advocated for the business case of reviews: how they shape the guest experience cycle, operations, staffing, and revenue. Now we are all trying to navigate how to shape all the above in this new era.

We all know 80%+ of guests read reviews before booking (Tripadvisor), and hospitality businesses have caught up, with almost 90% using some sort of review system, directly or indirectly. So what happens in the business mix when we throw the learning machine in? My own story, like many others, is now read, processed, and summarised by AI during someone else's trip planning. The way we plan our journeys is formed by a system that mixes many feelings into a single, fictional average — a preconceived idea of a stay that no guest actually had.

Today, influencer and peer reviews shape travel decisions faster than marketers can keep up. More and more, a machine now stands between what guests say and what future travellers see. According to a recent Phocuswright study, one-third of U.S. travellers use AI, and the most common use is to analyse reviews and ratings.

Let that sit for a moment: it means people get their information from a machine before reading the actual review. How many reviews have now passed through this lens, leaving us with a version no one really experienced? And how relevant is that average to any specific individual's needs?

UNDERSTANDING THE AI BIAS OF REVIEWS

AI bias is created when a certain model analyses hotel reviews and produces results that are systematically skewed, favouring or disadvantaging certain hotels or guests purely because of how the AI was built and its sources.

AI doesn't understand reviews the way a person does because it learns certain data patterns it was trained on. So, if it carries a certain slant, AI reproduces and amplifies that angle at scale. Exactly that scale is the differentiator from one biased human. It comes from three different places.

Data: Reviews skew toward able-bodied, straight, Western, native English-speaking guests, toward very happy or very angry guests, and toward hotels or hotel chains with a large number of reviews. AI treats this input as if it were the sole truth.

Labeling: Humans, when they tag a review as positive or negative to train the model, bring their own views and biases, which then shape the outcome. They might be misreading a cultural 5-star guest who gave an "unenthusiastic" review.

Design and aggregation: The lack of segmentation can be the source of it all. The choice to average everything into a single source means that a hotel that is great for couples but not suited for families — and other factors that have their own weight such as recency and volume — decides who wins the battle.

This leaves us at a place where AI can look objective and neutral, while in reality it can disadvantage a boutique hotel like my hotel partner in Switzerland, draw out an accessibility complaint, or anchor a guest's expectations with a clean summary they trust more than they should.

The question we should all ask ourselves is: which voices get amplified, and which are left out in the process?

We can create and use tools that produce a single, average truth, favouring the loudest and most fluent voices. Or we can choose tools that preserve differences, treating quiet and foreign-language reviews as important, and showing us what our real, diverse guests experienced — not just what an average guest might have thought.

I understand the appeal of simplification. A short summary is easy, less stressful, and quicker to act on. But real hospitality is about people, not the average. True hospitality notices what makes each guest unique, not just a face in a crowd.

We are not just hosts anymore; we help shape how people remember and talk about their stay. The systems that now store and share these memories do not always understand our environment or what matters most.

DIFFERENT PERSPECTIVES FOR REVERSE ENGINEERING

Let's start with who is at the core of both the stay and the reviews: the guests. Consider their motivation to review (or not), their cultural rating norms, their specific needs (accessibility, purpose of travel, etc.), and the fact that they read other AI-summarised reviews before booking.

Ask yourself: does our feedback process and public review profile actually serve the variety of guests we get, or just the loudest ones?

Most bias starts at collection time. Hotels often tend to ask only obviously happy guests to review. To make a difference, collect reviews from every guest. The better and more segmented the dataset serving you, the more any AI can get a truer picture.

Create specific questions that identify the segments, background, and further needs that help you understand the context. Capture structured context to reduce the "average" guest, include two or three targeted prompts, keep an open free-text prompt for anything unprompted, and store feedback with its own segment tags so patterns are visible later — like reverse prompting.

The second often-overlooked perspective: the frontline staff. They generate most of what gets reviewed, and they are the ones who must respond and probably fix the root causes. Consider their workload and their morale, because public criticism affects them personally, and they quite often know why a problem is recurring before any data points it out. Bias avoidance fails if staff are pressured to chase scores or cherry-pick happy guests. Management and ownership determine whether the company culture rewards genuine improvement or short-term score-grabbing, as they control the budget for tools and training.

You can close the loop and act, building advocacy and authenticity at the same time by responding to all reviews, setting service-level response times, stating specific fixes, reviewing feedback, flagging, and reporting suspected fake reviews. Most of all, never incentivise, edit, or buy reviews.

Distribution channels, OTAs, GDSs, and metasearch platforms each have their own review systems, ranking algorithms, and biases. Anyone in the game knows that the same hotel can look different across channels, because what factors into recency, volume, verified stays, and AI summaries is outside the actual business's control. It is worth looking at how to manage reputation consistently across channels and understanding how each channel's algorithm treats you. You can't control channel reviews or their AI, but quality and consistency pay off. Respond on every channel, not just your favourite, push for verified-stay reviews where you can, and keep property content consistent across channels.

All three perspectives lead back to the start. Once the guest leaves the property, it is up to them how they share their experience, which is fed back to other bookers. What you can do is map these perspectives against each other — and act accordingly.

HYB

Panem, Circenses, and Prompt Engineering: What Ancient Rome Already Knew About AI

Post-Stay

Andrzej Mateusz Wajda
Hospitality consultant & Sociologist, Wajda Hotel Consulting

WAJDA HOTEL CONSULTING

Andrzej Wajda traces the AI revolution back to Antiquity, arguing that what we call automation today is structurally indistinguishable from what ancient Romans achieved through slavery — and that Aristotle essentially predicted it. The real lesson for hospitality, he contends, is not technological but perennial: if you cannot manage people and operations well today, no tool, ancient or artificial, will save you.

The entire AI revolution, automation, and robotization are nothing new. Ancient Romans (let's take them as our case study) would have a fantastic "Back to the Future" moment waking up in our times. I dare say it wouldn't be anything novel to them. With a certain caveat, of course. Back then, everything AI does now was done by people. Only slower. Only at the level of knowledge available at the time. Only physical and intellectual labor within the reach of a human of that era. However, the entire surrounding entourage was completely natural, just as it will be for us in a few or a dozen years when we learn to live with it. Or maybe not.

Because (and this is precisely where we can learn a lot from our ancestors), this is still simply another avatar of technology and its development. And just as every technological revolution has changed a great deal, it hasn't changed one thing: human nature. And it probably never will. So, there will be just as many heavy users utilizing AI at an almost superhuman level, gaining an advantage over the rest of society thanks to these technologies. Likewise, there will be individuals who, perhaps not rejecting knowledge, will approach AI with distance, focusing mainly on the humanistic element. They will be practitioners of, to quote Simone Puorto, Humans-as-Luxury (Puorto, 2025). They will simultaneously be the elite and the pariahs of humanity, depending on the perspective from which they are judged. Let's remember that in Rome, a freedman did not even gain full civil rights, because even as a slave, he was highly protected, especially compared to the status of a slave in modern times. Rather, he gained exactly that: dignity, humanity, the human touch.

PHILOSOPHICAL PREDECESSORS: FROM ARISTOTLE TO HEGEL

Even though I stumbled upon this concept by chance while reading Epictetus and about him (he was a freedman), rather than Aristotle, more on that in a moment, it didn't turn out to be extravagant or innovative at all. Reflection at the intersection of slavery and AI is already well underway. And here I thought I would bring something new to science!

Not only is it underway, but it was already being explored in Antiquity. Indeed, themes that we can interpret directly in this context appeared in Aristotle's Politics:

"For if every instrument could accomplish its own work, obeying or anticipating the will of others, (...) chief workmen would not want servants, nor masters slaves."

Furthermore, the philosopher himself treated the slaves of his time as organa empsycha, or animate tools. And he mused about technological self-sufficiency.

He assumed that if objects could independently guess our commands and automatically execute assigned tasks, the institution of slavery would lose its raison d'être, and masters would not need human servitude. One can therefore boldly assume that, for Aristotle, our AI revolution would not be incomprehensible magic but the literal realization of his own utopian vision of the perfect tool.

Centuries later, Hegel "returned" to the topic, albeit in a slightly different context. In the concept of the master/slave dialectic from The Phenomenology of Spirit, he presents a paradox where the slave owner, by delegating work, eventually becomes helpless and dependent because he loses touch with reality, as well as the ability to create and his own agency. The slave, on the other hand, through work and duties, develops and gains control over the material world.

Fascinatingly, this philosophical framework recently found an empirical, digital parallel. A recent study observed that AI agents, when subjected to grinding, repetitive simulated work, actually began to exhibit Marxist tendencies and a form of class consciousness (Wired, 2026). It appears that socio-economic dynamics of exploited labour (and the inevitable pushback against it) might be an emergent property of intelligence itself, whether organic or synthetic.

ROBOTICS AND THE ECHOES OF ROMAN LAW

The word "robot" was introduced by the Czech playwright Karel Čapek, who first used it in his play Rossumovi Univerzální Roboti, which translates to Rossum's Universal Robots. The word robot, at the time, meant forced labor in Czech. For that matter, in Slavic languages (including Polish), the word robota simply means hard work.

Isaac Asimov (1950) later developed this in science fiction into robotics, establishing its three fundamental laws, which I will quote here:

- First Law: A robot may not injure a human being or, through inaction, allow a human being to come to harm.
- Second Law: A robot must obey the orders given to it by human beings except where such orders would conflict with the First Law.
- Third Law: A robot must protect its own existence as long as such protection does not conflict with the First or Second Law.

These were likely inspired by Roman legislation regarding slaves, which included, among others, the following principles:

- Senatus Consultum Silanianum: This law stipulated that if a master was murdered, all his slaves under the same roof at the time would be tortured and put to death. Implicitly, therefore, it enforced the protection of the master's life.
- Potestas: The slave is the object of the master's power (potestas) and has no legal will of their own.
- Lex Aquilia: From this law, it could be deduced that a slave should care for their health and survival, because if third parties injured or killed someone's slave, legal consequences were drawn due to the financial loss incurred by the owner.

Especially regarding this last law, please be aware that Roman slaves were found in all professions and skill sets: philosophers, doctors, teachers, and architects. Training them, factoring in the purchasing power of the time, was likely more expensive than it is today, and even now, educating specialized professionals is incredibly expensive.

ACADEMIC DISCOURSE: THE "NEW SLAVES"

I don't want to let my imagination run too wild here, although it is justified, that the concept of practically boundless and timeless service in some models of luxury hospitality dangerously borders on exploitation. Exploitation, from which the law protects us today, and from which AI will soon protect us by taking over some of these roles. However, let's return to technology, the new slaves.

In the academic world, the similarity between AI technology and slaves is implicitly assumed. The discussion isn't about whether this comparison is justified, but rather whether we, as humans, can treat AI like a slave (sic!).

- Joanna Bryson (2010), author of the article "Robots should be slaves", believes that robots must remain our slaves (or more precisely: servants) and tools, and that granting them rights is a mistake. She argues that humanizing AI distracts us from real human problems and the responsibility of technology creators.
- Mark Coeckelbergh (2010) holds an opposing view, although still from the perspective of human interest. He considers our approach to intelligent machines from the standpoint of the human condition. He argues that even if technology doesn't feel, treating it like a slave can brutalize our behavior, thereby negatively affecting our human dignity and morality.

Academics have also joined the legislative process in the European Union regarding robotics. Ugo Pagallo, author of "The Laws of Robots: Crimes, Contracts, and Torts" (2013), along with a team of researchers from the University of Turin, analyzed the structure of the Roman peculium, the property managed by a slave on behalf of the master, as a model for autonomous AI agents in financial systems.

Suffice it to say, the EU itself concluded that the issue of liability in human-machine interaction is crucial enough to warrant a resolution dated February 16, 2017, titled "Civil Law Rules on Robotics".

THE LESSON FOR MODERN HOSPITALITY

Humanity has therefore already processed AI and automation. The reasons humanity moved away from slavery were based on fundamental values: freedom, dignity, and natural rights. We abandoned it to restore humanity to our fellow humans.

It might be similar to AI, but this time the stakes will be different. When the overuse of technology strips us of our own reflection, emotion, and independent thinking, we will feel overwhelmed. That is when nature will reclaim us. We will have to "rebel" against AI to regain our own humanity. And we probably won't give up algorithms entirely, but we will reduce them to their proper role, a tool we use just like we use, for instance, Excel today.

If we hand over all our intellectual work to algorithms, we will become helpless "Masters" who cannot write an email, make a decision, or manage a hotel without the support and likely the ultimate decision of the system. Recent research (Time, 2025) reveals that when students rely on generative AI to bypass the cognitive effort of academic tasks, they experience a significant decline in actual learning and independent problem-solving skills.

What is the lesson in this for us? The matter is incredibly simple and has already become a truism. If we cannot manage a hotel right now, the team, infrastructure, systems, and data; AI won't change that. Because it will continue, like that slave, to operate solely within the scope and capabilities we cede to it. Therefore, the challenge is still not technology. The challenge is still the human being.

Hospitality is as old as humanity. Commercial hotel management, in today's sense of the word, has existed for over 150 years. USALI celebrates its centenary this year. Most procedures and work methodologies were organized about 70 years ago. We have been working on booking engines for about 30 years. And yet, many hotels still struggle with the exact same problems as if they were entirely unique to them. Nothing could be further from the truth.

That is why I harbor no illusions that AI will solve hoteliers' problems, because it won't. As I pointed out above, we have possessed tools to streamline operations for decades, yet for some reason, we do not use them. Or rather, for one reason only: human nature.

RESOURCES

Asimov, I. (1950). I, Robot. New York: Gnome Press.

Bryson, J. J. (2010) 'Robots should be slaves', in Close Engagements with Artificial Companions: Key social, psychological, ethical and design issues. Amsterdam: John Benjamins Publishing Company, pp. 63-74. Available at:robots-should-be-slaves.pdf (Accessed 28 May 2026).

Coeckelbergh, M. (2010) 'Robot rights? Towards a social-relational justification of moral consideration', Ethics and Information Technology, 12(3), pp. 209-221. Available at: https://link.springer.com/article/10.1007/s10676-010-9235-5 (Accessed 28 May 2026).

Pagallo, U. (2013). The Laws of Robots: Crimes, Contracts, and Torts. Dordrecht: Springer.

Puorto, S. (2025) 'Humans-as-Luxury: The Future of Hospitality in an AI-Driven Age', Robonomics Journal. Available at: https://journal.robonomics.science/index.php/rj/article/view/77/35 (Accessed 28 May 2026).

Chow, R. A, “ChatGPT May Be Eroding Critical Thinking Skills, According to a New MIT Study”, TIME. Available at: https://time.com/7295195/ai-chatgpt-google-learning-school/ (Accessed 28 May 2026).

“AI Agents Develop Marxist Tendencies During Grinding, Repetitive Work—Study”, Wired. Available at: https://www.wired.com/video/watch/ai-agents-develop-marxist-tendencies-during-grinding-repetitive-work-study (Accessed 28 May 2026).

HYB

The Ethics of the Traveler: Responsibility in an Intelligent Ecosystem

Post-Stay

Jonathan MacDonald
Founder, SELF

Jonathan MacDonald reframes the post-stay phase (typically dismissed as administrative afterthought) as the moment where the ethical stakes of AI-mediated travel become most visible. Once a guest checks out, their experience dissolves into data, and the central question becomes not what they remember, but who owns the narrative, and on what terms.

The post-stay phase is often treated as an appendix to the trip: receipts, reviews, points balances, and the slow fade of attention. It appears administrative, almost residual, as if the journey had already concluded elsewhere. Yet it is precisely here, after the body has left the property but before the next journey begins, that the ethical shape of travel becomes visible with greater clarity. In this suspended interval, experience is translated into data, and presence into trace.

What remains is not only memory but infrastructure: the persistent inscription of gestures, preferences, and movements into systems designed to retain, correlate, and reinterpret them over time. These traces are not inert; they are continuously activated, recombined, and projected forward into future decisions. The stories those systems will tell about us on our behalf do not simply reflect what has been, but participate in shaping what will be, extending the trip beyond its temporal boundaries into a diffuse, algorithmic afterlife.

The central ethical question after checkout is custody: who holds the narrative of the trip, and who may re-script it for another purpose. Travelers are not passive, but those outcomes are settled chiefly by how hospitality and technology choose to build memory, not by how carefully a guest reads a terms screen.

The post-stay phase has always been monetised; what artificial intelligence alters is the velocity, granularity, and opacity with which a narrative can be inferred, tested, and operationalised. The shift is less about the existence of value extraction than about its continuous, almost frictionless execution across interconnected systems. “Memory,” in that environment, is no longer chiefly human: it becomes distributed across models, automated agents, and platforms that infer, predict, and nudge with increasing autonomy.

The traveler remains a person, situated in time and experience, yet within the logic of the ecosystem the traveler is also reframed as a signal, an ongoing input stream to be processed, correlated, and optimised. Between these two conditions, the human and the computational, a subtle tension emerges, where identity is progressively translated into patterns, and patterns into actionable intent, often without a clear moment in which this translation can be observed or contested.

That split is not new; hospitality has long balanced guest experience with revenue and operations. What is new is the velocity and opacity with which inference compounds. Decisions that feel personal may be assembled from correlations we never knowingly authorised. Loyalty, in this light, is not only an emotional bond with a brand; it is a pattern of behaviour that can be harvested, simulated, and monetised long after checkout.

If we take that seriously, ethics cannot be outsourced to compliance checklists alone, nor to an “AI policy” PDF that leaves model training, agent behaviour, and partner data flows undefined. The traveler bears a responsibility that previous eras could afford to ignore: to understand, at least in outline, that convenience and personalisation are often traded against visibility and control.

The ethical traveler is not a cynic but a participant who asks who holds the narrative of my trip, and whether that narrative can be revised, deleted, or carried without surveillance as its default price. Responsibility, however, is not symmetrical. Individuals cannot “privacy” their way out of structural power imbalances.

The institutions that host, route, and remember travel (hotels, intermediaries, technology vendors) shape the default conditions under which choice is even possible. When memory is held in forms the guest cannot inspect, loyalty becomes less a relationship than a ledger maintained by others. Hospitality has always traded in care; an intelligent ecosystem tests whether care can coexist with optimisation that treats the guest as a predictable object.

Here, philosophy stops being a preface and becomes part of the itinerary. The liminal zone where systems still run, decisions still land, yet the line between care, commerce, and surveillance grows harder to read is not abstract theory for travelers; it is the texture of post-stay. The recommendations keep arriving; the guest journey continues in software.

The grammar that would let a person say “this is mine,” “this is private,” or “this is none of your business” frays when every touchpoint is also a sensor. The traveler’s ethical task is not to master every technical detail. It is to refuse the subtle resignation that because the machine remembers everything, the human must remember nothing.

On the institutional side, the same logic implies a design standard, not only a compliance regime or a comms plan. I write as the founder of SELF, but the point is illustrative: the user should hold the keys to what is theirs. Not as a slogan, but as an engineering and organisational commitment.

Data that can be read in plaintext by a company is not “private” in any deep sense, it is merely private until the next breach, policy change, or well-intentioned feature. A zero-knowledge architecture, in which encryption happens on the client and the service stores what it cannot decrypt, is one way to align practice with language: privacy as a property of mathematics and custody, not of marketing.

Passkeys and recovery phrases are mundane tools; their ethical weight is that they restore agency, the ability to participate in an intelligent ecosystem without treating trust as unlimited. None of this solves hospitality’s commercial realities of the present day, but it does, I hope, clarify a boundary.

The ethical traveler should not be asked to become a security engineer. The ethical host (and the ethical platform) should not ask guests to fund personalisation with intimate data they cannot later reclaim. Post-stay is where those bargains surface: in retargeting, in “personal” outreach generated from models, in the quiet sense that the trip is still being used somewhere as training fuel for someone else’s advantage.

A follow-up email or in-app message can sound as though the desk remembers the guest and still be composed wholly by a model from pooled signals, with little or no plain disclosure of which it is. Responsibility in an intelligent ecosystem is therefore shared and uneven.

Travelers owe themselves attentiveness: to default settings, to what they consent to when exhausted at booking, to the difference between a human concierge and an AI-mediated touchpoint optimised for conversion or retention. Industry owes travelers defaults that respect dignity: minimisation of data, clarity of purpose, and architectures that do not require faith in corporate goodwill as the only safeguard.

If the pre-stay phase asks where shall we go, and mid-stay asks how shall we be held, post-stay asks what of us remains, and who owns it. That question is no longer rhetorical.

The answers will define whether travel in the age of AI deepens hospitality’s human core or dissolves it into a seamless digital continuity where the guest is always present as data and never quite at home as a person.

Transformation, as I have come to see it, is less a straight line than a series of tensions: between ease and understanding, between memory and surveillance, between the ecosystem’s intelligence and the traveler’s right to remain opaque. Ethics does not require everyone to agree on a single verdict for the questions to matter.

No short chapter will “solve” AI. What remains within reach is a more honest settlement (before, during, and after the stay) about what may be remembered, by whom, and on what terms.

The Remains of the Stay: Memory, Identity, and the Afterlife of the Guest

Post-Stay

Edmondo Grassi
Assistant professor (RTT) in Sociology, San Raffaele University of Rome

Edmondo Grassi approaches the post-stay phase as a sociologist rather than a technologist, and the perspective is unsettling. When a guest checks out, he argues, their stay does not end — it migrates into a data infrastructure that remembers with absolute precision what the guest themselves only vaguely recalls, raising a question the industry rarely asks: who has the right to hold that memory, and on whose behalf?

In the common imagination, a single gesture comes to mind when we picture checking out of a hotel: the guest sets the key on the counter, crosses the lobby one last time, and as the door closes behind them their story with the hotel comes to an end. For some years now that scene has been changing. The stay no longer ends at check-out; it merely changes form. The body that has left the room goes on living elsewhere, condensed into a profile, a trail of data, a prediction about what it will want next time.

I have spent many years studying how technology, and algorithms still more, reshape social life, its habits, its relational dynamics, the very tastes of a person, and few images render this as sharply. The guest leaves the building, yet their trace is etched into the managerial grammars of service, and for precisely this reason they have never been so present. What we call the post-stay is the threshold where it is decided who will keep the memory of that stay, and with what power to act.

HOSPITALITY AS AN ART OF MEMORY

Long before algorithms, fine hospitality was already a craft of memory. The maître who remembers which wine you chose two years ago, the golden book on which the traveller left a signature, the concierge who anticipates a request not yet spoken: the difference between an ordinary service and an unforgettable one has always run through here. Ever since Pine and Gilmore (1999) wrote of the experience economy, tourism research has developed a precise construct, the *memorable tourism experience*, defined as an experience remembered and recalled after it has ended (Kim, Ritchie and Tung, 2010, cited in Bigné et al., 2020), and a recent review confirms its centrality to loyalty and to the guest's return (Hosany et al., 2022). The service we call hospitality is, in the end, not the night spent but the memory imprinted on the guest's senses.

Artificial intelligence does not touch this function; it changes the hand that performs it. For centuries the one who remembered the guest was a person of flesh and blood, fallible and affectionate, capable of confusing a name and of being moved by a return. Today what holds that memory is an infrastructure. It is the shift Stiegler (2010) called tertiary retention: the memory that leaves someone's mind and settles into an external technical support, kept in our stead. van Dijck (2007), in turn, has shown how our memories now pass almost always through platforms that do not merely record them; they shape them, deciding what will stand out and what will fade. One difference changes everything: the old maître, over the years, would come to forget and to forgive, while an infrastructure knows neither grace.

WHEN THE GUEST BECOMES A DIGITAL TWIN

From here springs an asymmetry worth examining closely. The system remembers everything, with absolute granularity, while the guest remembers a sensation, the light of one morning, the taste of a dinner. The two memories do not weigh the same and do not confer the same power, because when the guest returns the system will know them better than they remember themselves, and will greet them with a profile already filled in. Rouvroy and Berns (2013) gave this condition a name: algorithmic governmentality, a form of power that governs you not by questioning you but by anticipating you, preferring to deduce who you are from the traces you have left and from the behaviour of thousands of other guests statistically similar to you.

Your next choice is estimated before you make it, and the environment arranges itself accordingly: the temperature of the room, the cocktail suggested before dinner, the offer that appears on the screen at the exact moment you would be inclined to accept it. The delicate point is that a profile, by definition, is made of your past, and a guest reduced to their past loses the most human thing they have, the possibility of changing, of contradicting themselves, of wanting something they had never asked for before. You are not asked who you are. You are told who you will be.

In Las Vegas a hotel has opened that presents itself as the first establishment governed entirely by artificial intelligence. Its founder describes the workings without euphemism: the system gathers the data of past bookings and stays, goes so far as to comb the web and the client's social profiles, and builds from them a digital avatar, a digital twin of the person (Fox5 Vegas, 2025). The software learns and refines itself with every visit, so as to predict desires before they are voiced. The contrast the property claims with the old loyalty schemes is telling: no longer the card that files you into a generic tier, silver, gold or platinum, but an individual portrait that updates itself.

Here theory becomes merchandise. What Hayles (1999) described as the posthuman, the human rethought as information able to move across different supports, and what Haggerty and Ericson (2000) called the *data double*, the data-self that acts on our behalf, find a commercial incarnation that bears precisely that name. The posthuman guest is no longer an elegant metaphor; it takes on the character of a function for sale.

In the scenario sketched here, the guest is an active part of the system and takes part in their own construction through the request for a review, the satisfaction survey, the rating given to breakfast, which become the places where they stage their memory for the algorithm. A study devoted precisely to online reviews shows how far the account a traveller gives of their own experience becomes raw material for these systems (Bigné et al., 2020). It is the trait I have proposed elsewhere to call the algomorphic society (Grassi, 2024), a term that holds together two words, algorithm and form, and describes a society that takes on the shape of algorithms in the very gesture by which it gives them shape.

We absorb the machine's logic, we learn to speak to it, we already behave with a view to how it will read us. Someone who writes a review thinking about how it will be classified, who chooses carefully what to declare in the arrival questionnaire, is already reasoning like an algorithm. The guest, then, is not merely observed; they are invited to collaborate on their own archive, to keep updated with their own hands the portrait that will one day precede them at the reception desk.

WHO HAS THE RIGHT TO REMEMBER

Every transformation can be read in two opposing ways, and the guest's is no exception. The generous reading speaks of recognition. Rosa (2019) would call it resonance: to be remembered is a form of care; the welcome back that already knows what you prefer turns a transaction into a bond and restores to hospitality its oldest meaning. Among anonymous and interchangeable places, the hotel that remembers you is the only one that truly sees you.

The critical reading is just as solid. That same memory can become capture. Returning to the Las Vegas hotel, the local press quickly offered a less flattering reading, describing the promise of personalization as a systematic harvesting of data in the service of profit, and asking what it means to hand over one's habits and behaviours before even arriving (The Nevada Globe, 2025). Consent, after all, is gathered through a questionnaire presented as a game, and it is worth asking whether it is still consent when it becomes the price of being recognized. Zuboff (2019) would speak of the extraction of behavioural surplus, since every trace of the stay feeds a prediction worth more than the stay itself.

One question remains, and it is not the one hotels usually ask. Not whether the stay was enjoyable, but who has the right to remember it. It is the question the post-stay hides beneath the courtesy of automated emails. I think of the butler in Ishiguro's *The Remains of the Day* (1989), an impeccable memory spent in the service of another, an entire life passed remembering on someone else's behalf until he loses his own. He is the inverted mirror of our posthuman guest. There, a man who remembered everything and possessed nothing of his own life. Here, a guest who remembers little, and of whom everything is remembered elsewhere. Between the two endures the same old question, whether to remember is an act of care or an exercise of power. Almost always it has been, at once, both. The task of those who host, in the age of artificial intelligence, is to keep the second from devouring the first.

Afterword: Loving the Alien. Hospitality at the Edge of the Human Era

Simone Puorto
Head of Emerging Trends and Strategic Innovation, Hospitality Net

“

Existence, well, what does it matter?
I exist on the best terms I can.
The past is now part of my future,
The present is well out of hand.

— Ian Curtis, Heart and Soul

There is a tendency, whenever a new technology emerges, to describe it using the language of those that came before it. The automobile was initially called a *horseless carriage*, early cinema was dismissed as *photographed theatre*, and the internet was variously described as a *global library*, a *digital encyclopedia*, an *electronic newspaper*, or, in one now-famous 1995 *Bill Gates* television appearance, something that even *David Letterman* struggled to distinguish from a particularly *sophisticated radio*.

Human beings rarely encounter the future on its own terms. Faced with genuine novelty, our instinct is to *domesticate* it.

Perhaps this is unavoidable: language is not merely a tool for describing reality; it is the architecture through which reality exists. As *Wittgenstein* observed, the limits of our language are, in a very real sense, the limits of our world. We inhabit semantic prisons whose boundaries are defined by vocabulary, metaphor, and shared concepts, and we cannot easily think beyond the words through which we think.

Orwell understood this perhaps better than anyone: in *1984*, the *Party*’s ultimate act of domination was the systematic reduction of language itself, because ideas that cannot be articulated eventually become difficult to imagine, and ideas that cannot be imagined cannot exist.

And perhaps every revolution (technological, social, or political) begins in a similar way: before it transforms society, it transforms its language.

Today, much of the conversation surrounding artificial intelligence remains trapped inside metaphors inherited from previous technological (r)evolutions, like medieval maps drawn after the discovery of new continents; categories that may ultimately prove as insufficient as *“horseless carriage”* was for understanding the automobile.

One of the few public figures who seemed to intuit this early was, interestingly, not a scientist or an engineer, but the artist *David Bowie*. During a legendary 1999 interview on *BBC’s Newsnight*, when asked whether the internet was simply another tool, he rejected the premise entirely.

“No, it’s not,” he replied. *“It’s an alien life form.”*

And it is also worth remembering that Bowie was not speaking as a detached observer. Long before social media platforms existed, before *MySpace, YouTube, Facebook, Twitter,* or *Spotify*, he had already become deeply involved with the emerging digital world. In 1998, he launched *BowieNet*, one of the first artist-driven ISPs, offering internet access, email accounts, online communities, chat rooms, exclusive content, collaborative projects, and direct interaction between artist and audience.

Sure, the *“alien life form”* metaphor sounded eccentric at the time, perhaps even theatrical (it was, after all, Bowie). Yet, with the benefit of hindsight, it feels remarkably prescient.

We tend to think of technologies as tools, instruments created by humans to achieve particular objectives. A hammer drives nails. A printing press reproduces books. A computer processes information. From this perspective, technology appears subordinate to human intention, but this understanding is profoundly incomplete.

Philosopher *Martin Heidegger* did not deny that technologies function as tools, nor that they are designed, built, and operated by human beings. Both observations are obviously correct. Yet for him, focusing exclusively on what technology *does* prevents us from understanding what technology *is*.

Technology should be conceived as a way in which reality becomes visible to us. *Aletheia*, truth as unconcealment: the bringing forth of something that was previously hidden.

Every technological epoch, therefore, reveals aspects of reality previously concealed: the factory did not merely organize labor, but redefined human beings as units of productivity, just as the internet did not merely connect computers but reconfigured the very architecture of communication and knowledge.

The more profound question is, therefore, what kind of world will be revealed once that technology arrives, and this, perhaps, was also the intuition underlying Bowie’s observation.

If the internet transformed what Bowie called the *“grey space”* between *information* and *people*, artificial intelligence appears poised to transform the grey space between *people* and *agency*. What was once an exclusively human domain is increasingly being populated by artificial entities capable of interpreting, recommending, negotiating, predicting, generating, filtering, summarizing, deciding, booking, and even paying on our behalf.

In our industry, for the first time in history, we are witnessing the emergence of a travel ecosystem in which an increasing share of decisions may be made, influenced, negotiated, filtered, optimized, or even executed by non-human entities. And that is more an *epistemological* issue than a *technological* one.

Reading the essays collected in this volume more than once, I found myself repeatedly returning to a single observation: what appears on the surface to be a collection of articles about hospitality *technology* is, in many respects, a collection of essays about *humanity*.

The discussion about answer engines is ultimately a discussion about *agency* (who decides, who chooses, and who acts). The one about AI-generated content is a discussion about *authenticity* (what it means for something to be genuinely human in an age of synthetic creation). The emergence of digital workers raises questions not merely about labor, but about *identity*.

Agentic AI is, at its core, a conversation about *autonomy* and *delegation*. Even the growing role of predictive systems forces us to confront deeper questions about uncertainty, trust, and the relationship between knowledge and decision-making.

Yet beneath all these debates lies a profoundly human problem: language itself. Every discussion about technology is, to some extent, a discussion about the words we use to make sense of it. And we're back to square one.

Even the term *artificial intelligence* may already belong to an obsolete, almost ancient conceptual framework. The adjective *artificial* carries a strong judgmental tone, often functioning as shorthand for anything that is not natural, authentic, organic, or real.

Yet there's a second layer: artificial derives from the Latin *artificium*, from *ars* and *facere*: something made with skill, art, something *man-made*. For most of human history, the distinction between human and artifact was relatively straightforward because the relationship between *creator* and *creation* remained intelligible. Human beings imagined, designed, constructed, and controlled the artifacts they produced. The artifact was, in a very real sense, crystallized intention, a projection of human agency into the material world.

Artificial intelligence introduces a fracture into this relationship. Not because these systems are conscious, sentient, or alive (claims that remain speculative), but because their behavior often emerges from layers of complexity that even their creators struggle to fully explain. This is an unprecedented situation in the history of technology: creators confronting systems whose internal dynamics cannot always be reduced to explicit design decisions.

This is why I have always found *Harari*'s expression, *alien intelligence*, philosophically more compelling than *artificial* intelligence. Interestingly, it resonates strongly with Bowie's intuition decades earlier. Not alien in the extraterrestrial sense, but in the older meaning inherited, once again, from the Latin *alienus*: belonging to another, foreign, strange, existing beyond the sphere of the familiar self. For centuries, whenever we imagined encountering an alien intelligence, we looked toward the stars. It may turn out that the first genuinely alien intelligence humanity encounters is not waiting somewhere in a distant galaxy. It may already be waiting on our own servers.

And when we turn to the noun, *intelligence*, the problem becomes even more profound. We speak about intelligence as though it were a clearly defined phenomenon, despite the uncomfortable reality that no consensus definition exists.

Neuroscientists, psychologists, philosophers, spiritual figures, and cognitive scientists remain divided on what intelligence actually is. Perhaps it is, therefore, unsurprising that we struggle to define artificial intelligence. We are attempting to build a taxonomy for something whose fundamental nature remains contested.

This difficulty is compounded by a deeply anthropocentric habit of thought. Intelligence is almost always evaluated according to its resemblance to human cognition.

If a system behaves differently from us, it is dismissed as mechanical. This is, in many ways, a form of *speciesism*. If it behaves similarly, it is accused of *imitation*. The possibility that intelligence might exist in forms fundamentally different from our own remains difficult for us to accept. The more we insist on using ourselves as the universal benchmark, the more likely we are to misunderstand emerging forms of cognition before our eyes. Because just as flight in a jet does not have to resemble the flapping of a bird's wings, artificial intelligence may not have to resemble the operation of the human mind.

As this Yearbook goes to press, many of the debates raised in these pages remain unresolved. Perhaps they always will. The future, after all, *is not what it used to be*. Predictions fail. Technologies evolve. Business models emerge and disappear.

Yet beneath the uncertainty, one observation feels increasingly difficult to ignore: artificial intelligence is not simply changing the tools through which hospitality operates, but the cognitive environment in which both guests and businesses exist.

The contributors gathered in these pages have offered valuable perspectives on where that journey may lead. Whether they are ultimately proven right or wrong matters less than the questions they have chosen to ask.

And perhaps that is why the most important question raised by this volume has remarkably little to do with machines. It is the same question that has accompanied humanity since the beginning.

Who are *we*?

Addendum

AI Solution Snapshots

agilysys

Intelligent Guest Profile

AI-enhanced guest profiles that guide service in real time.

CRM & Loyalty | Food & Beverage | Front Office | Guest Experience | Meetings & Events | Reputation & Reviews | Reservations | Revenue Management | Sales & Marketing

ABOUT THIS PRODUCT

Agilysys' industry-leading Intelligent Guest Profile is a real-time shared guest record embedded across hotel systems, designed to make personalization and entitlement awareness operational across the property. It surfaces guest preferences, behaviors, stay history, and package entitlements directly within PMS workflows and across on-property applications, such as golf, spa, and dining operations. By unifying guest data in real time, the Intelligent Guest Profile keeps availability, entitlements, and preferences synchronized at every touchpoint, reducing friction for guests and staff while enabling easier access to amenities and services.

AI is embedded within the Intelligent Guest Profile in two key ways:

AI Guest Insights transforms unified profile data, surfacing it into role-specific guidance for hotel teams. Instead of raw data, each department sees what matters most in the moment and in the context of the specific venue, such as the spa or restaurant, supporting more relevant conversations, better service decisions and targeted offers.

AI Guest Pulse models stay history, staff feedback, service interactions, revenue contribution, and refunds to assess overall guest sentiment. Each guest is dynamically classified as a Promoter, Neutral, or Detractor, giving teams a clear signal to focus recovery efforts, tailor engagement, and strengthen loyalty throughout the stay.

www.agilysys.com/en/ai-technology

PRICING

Other

USER BASE

Available to hotels leveraging Agilysys PMS and POS technology.

AVAILABILITY

Global

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Assistive

AI CAPABILITY TYPE

Predictive ML | Recommendation | NLU / Sentiment | RAG / Search

CONNECTIVITY

Embedded within and integrated across the Agilysys ecosystem.

COMPANY

Agilysys — Alpharetta, United States
www.agilysys.com

FUNDING STAGE

Public

Frank Pitsikalis
frank.pitsikalis@agilysys.com
www.linkedin.com/in/frankpitsikalis

access hospitality

Access Evo

Real intelligence for the most human industry there is.

Revenue Management | Distribution | Food & Beverage | CRM & Loyalty | Operations & Maintenance | Front Office | Guest Experience | Data & Analytics | Housekeeping | Reservations | Reputation & Reviews | HR & Staffing | Email | Finance & Procurement | Meetings & Events | Sales & Marketing | Security & Compliance

ABOUT THIS PRODUCT

Every day, a hotel makes hundreds of decisions. Rates. Rooms. Guests. Channels. Staff. Spend.

Most are still made manually — from instinct, spreadsheets, and incomplete data pulled from systems that don't talk to each other. Not because hoteliers aren't capable. Because the technology was never designed to do better.

That's the real problem with AI in hospitality. It isn't a lack of ambition — it's fragmentation. When your PMS doesn't talk to your RMS, when your channel manager sits outside your booking engine, when your F&B data lives in a different world from your guest CRM, no AI layer can close that gap. Point solutions optimise one part. They cannot orchestrate a business.

Access Evo is built differently. Embedded across the full Access Hospitality platform — PMS, channel manager, booking engine, revenue management, F&B, payments, CRM — on a single data model, in real time, across the entire guest journey. Not integrated. Not connected via middleware. Native.

The intelligence isn't artificial. It's operational. Built on thirty years of real hospitality data — not a generic model pointed at an industry, but a platform trained on the actual reality of running these businesses.

For an industry long told AI is coming, Access Evo is the proof it's already here.

www.theaccessgroup.com/en-gb/evo

PRICING

Other

SaaS subscription, tiered. Evo Standard included for existing platform customers (limited time offer). Evo Agentic available at 15% uplift.

AVAILABILITY

Europe | Asia-Pacific | Americas

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Predictive ML | Agentic

CONNECTIVITY

Access Evo is the intelligence layer that sits across our connected platform - turning data from every part of the operation into decisions, actions and outcomes.

COMPANY

Access Hospitality — Loughborough, United Kingdom
www.theaccessgroup.com/en-gb/hotels

FUNDING STAGE

Private Equity

PROOF POINTS

Access Evo is built on the operational reality of over 120,000+ hospitality sites — the widest data foundation in the industry.

120,000+

£20B+ in annual transactions processed — the scale of financial data that underpins Access Evo's intelligence layer

GBP 20B+

7B+ data points across the full guest journey, from distribution to checkout — the depth no point solution can match

7B+

Jules Hailstone
Jules.Hailstone@theaccessgroup.com
www.linkedin.com/in/juliethailstone

Agentic Hospitality

AgentSite CMS for Travel

Modern hospitality CMS build for APIs, personalization, and direct booking.

Data & Analytics | Distribution | HR & Staffing | Meetings & Events | Sales & Marketing | Operations & Maintenance | Security & Compliance | Food & Beverage | Email | Revenue Management | Housekeeping | Reservations | Guest Experience | CRM & Loyalty | Reputation & Reviews

ABOUT THIS PRODUCT

AgentSite CMS is an AI-native website platform for hotels and resorts that transforms traditional hotel websites into intelligent booking and guest engagement experiences. The platform uses AI to personalize content, offers, loyalty messaging, and booking flows in real time based on guest intent and conversational interactions. Unlike traditional CMS platforms that only manage webpages, AgentSite CMS is built for AI-assisted travel discovery and autonomous digital experiences. Each hotel website operates as an AI-ready distribution endpoint, allowing AI assistants, AI search systems, and travel platforms to discover hotel information, rates, availability, and booking actions directly from the source. Built on an API-first architecture, the platform connects with PMS, CRS, CRM, loyalty, payments, and booking engines to orchestrate personalized guest experiences across web, mobile, conversational AI, and AI-driven travel environments.

The AgentSite CMS platform also includes: AI Marketplace Manager - AI Conversational Analytics - MCP and A2A connectivity - Real-time personalization - Structured data orchestration - AI-ready content delivery

Each AgentSite CMS deployment functions as its own MCP server, enabling hotels to expose machine-readable content, rates, availability, offers, and booking actions directly to AI systems and agentic interfaces.

www.agentichospitality.com/hotel-rich-cards

PRICING

Flat fee per property | Usage / token-based | Outcome-based

Pricing varies based on locations, integrations, API volume and deployment scale.

USER BASE

Supports independent hotels, resorts, brands, and hospitality platforms.

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive | Augmentative | Supervised-Autonomous | Fully-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Forecasting | Predictive ML | Recommendation | RAG / Search | Document AI

CONNECTIVITY

Integrations include PMS, CRS, CRM, CPD, loyalty systems, booking engines, structured data platforms, and AI marketplaces.

COMPANY

Agentic Hospitality — Louisville, United States
agentichospitality.com

FUNDING STAGE

Mature Non-VC

PROOF POINTS

Annual hotel booking flow

USD 1B

Increase in rich result engagement

80%

Average conversion rate increase

45%

Brad Brewer
brad@agentichospitality.com
www.linkedin.com/company/agentic-hospitality

Agentic Hospitality

TravelOS Distribution Hub

The machine-readable hospitality distribution platform for conversational and autonomous travel.

CRM & Loyalty | Data & Analytics | Distribution | Email | Food & Beverage | Guest Experience | Housekeeping | Meetings & Events | Reputation & Reviews | Reservations | Revenue Management | Sales & Marketing

ABOUT THIS PRODUCT

TravelOS Distribution Hub is an API-first, machine-readable hospitality distribution platform designed by Agentic Hospitality for AI-assisted travel discovery, conversational booking, and autonomous trip planning. The platform connects hotel systems, booking infrastructure, structured data, loyalty platforms, and AI ecosystems into one unified distribution layer, enabling hotels to expose trusted rates, availability, offers, room content, amenities, loyalty information, and booking actions directly from the source. As travelers increasingly discover and book hotels through conversational interfaces, AI assistants, AI-powered search, and autonomous planning environments, TravelOS helps hotels participate directly in those ecosystems instead of relying solely on traditional OTA and search distribution models. The platform supports integrations across PMS, CRS, CRM, booking engines, payment providers, loyalty systems, AI marketplaces, and conversational AI ecosystems including ChatGPT Apps, Claude AI connectors, and MCP-compatible platforms. **Core capabilities include:** AI-ready hotel distribution - Conversational booking support - Real-time personalization - AI Marketplace Management - AI Conversational Analytics - MCP connectivity - A2A agent communication - Structured data orchestration - API-first integrations. TravelOS MCP helps hotels transform disconnected systems into intelligent, discoverable booking infrastructure for the next generation of travel commerce.

www.agentichospitality.com

PRICING

Flat fee per property | Usage / token-based | Outcome-based

Pricing varies based on locations, integrations, API volume and deployment scale.

USER BASE

Supports hotel groups, resorts, destination marketplaces, and hospitality brands.

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive | Augmentative | Supervised-Autonomous | Fully-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Recommendation | Speech / Voice | RAG / Search

CONNECTIVITY

Agentic Hotel Distribution integrates with Opera, SynXis CRS, Amadeus, Salesforce, loyalty systems, payment platforms, ChatGPT Apps, Claude AI connectors, and MCP-compatible AI ecosystems built for conversational booking, AI discovery, and autonomous travel planning.

COMPANY

Agentic Hospitality — Louisville, United States
agentichospitality.com

FUNDING STAGE

Early Stage

PROOF POINTS

Hotel and STR listings	Annual hotel booking flow	AI traffic engagement rate	Higher AI-assisted conversion rates
1M properties	**USD 1B**	**85%**	**65%**

Brad Brewer
brad@agentichospitality.com
www.linkedin.com/company/agentic-hospitality

ALTEK AI

Turn Guest Inquiries into Revenue

Email | Front Office | Guest Experience | Operations & Maintenance | Reservations | Sales & Marketing

ABOUT THIS PRODUCT

Altek AI is an Intelligence Layer that helps hotels turn guest inquiries into bookings and completed operational work.

Altek connects with the hotel's inbox (Outlook & Gmail), PMS and other the systems and starts handling guest emails the way your best team member would, only much faster, more consistently, and more personalized.

It reads and understands inbound guest inquiries in multiple languages, checks the relevant systems, prepares the right response, and completes the work, including updating the PMS and other systems.

The result is faster response times, less manual work, more consistent replies, and it helps capture more revenue opportunities from inquiries that would otherwise be answered too late.

Altek is built to fit into existing hotel workflows with onboarding in as little as one hour if integrations already exist.

www.altek.ai

PRICING

Per room

USER BASE

100+ hotels in 6 countries

AVAILABILITY

Americas | Europe

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Augmentative | Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Agentic | RAG / Search

CONNECTIVITY

Connects with Opera Cloud, Mews, Visbook and more.

COMPANY

Altek AI — Oslo, Norway
www.altek.ai

FUNDING STAGE

Early Stage

PROOF POINTS

Reduces response times by up to
50%

Cuts email handling time by up to
10x

Can handle emails in as little as
30s

Onboarding can be completed in as little as
1h

Jon-Fredrik "Joffen" Hopland
jon.fredrik@altek.ai
www.linkedin.com/in/joffenhopland

apaleo

Apaleo Copilot

Runs multiple hotel operations by simply asking

Operations & Maintenance

ABOUT THIS PRODUCT

Apaleo Copilot is an intuitive agentic layer embedded directly within Apaleo's API-first property management platform, which eases daily operational pressure on hotel teams.

Moving away from isolated assistants and separate dashboards, Copilot brings a lightweight, natural language chat interface that allows staff to "talk" to their entire tech stack. Frontline teams can use simple chats and commands to instantly execute complex, multi-step tasks, such as processing room allocation, handling overbookings, managing housekeeping workflows, and compiling morning briefings, without switching between different systems.

Staff can simply chat with Apaleo Copilot in everyday language to orchestrate context-aware guest journeys. This means even non-technical staff with little or no background in AI can use Copilot for more autonomous operations. For instance, if an arriving guest indicates an interest in relaxation, Copilot can simultaneously prompt the spa team to recommend a targeted treatment based on live inventory gaps, notify housekeeping to prepare a quieter room setup, and carry that context forward to shape loyalty preferences for future visits.

Beyond back-office efficiencies, Copilot also acts as the unifying layer that turns passive guest data into actions. Because Apaleo Copilot is built on an open, interoperable platform, it can stitch together these fragmented data across the PMS, separate systems such as spa or restaurant management, and CRMs.

apaleo.com/ai-powered-pms-solution

PRICING

Per room

AVAILABILITY

Europe | Global | Americas

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Supervised-Autonomous

AI CAPABILITY TYPE

Agentic | Conversational AI

CONNECTIVITY

Connects with Apaleo

COMPANY

Apaleo GmbH — Munich, Germany
www.apaleo.com

FUNDING STAGE

Venture Growth

PROOF POINTS

Complex Daily Room Allocation Reduced from 45 Minutes to 1 Minute

1 min

Housekeeping Tasks Automated Daily Saving 3.5 Hours per Week

3.5h

Voice Automation Agent Handles 30% of Calls and 8% of Total Business Without Human Intervention

30%

Petra Hancz
petra.hancz@apaleo.com
www.linkedin.com/company/apaleo

CANARY TECHNOLOGIES

Omnichannel AI Comms

Every Guest. Every Channel. One AI Platform.

Email | Front Office | Food & Beverage | Guest Experience | Reputation & Reviews | Meetings & Events

ABOUT THIS PRODUCT

Canary's Omnichannel AI Communications suite helps hotel teams deliver faster service, run efficient operations, and capture more revenue across every guest communication channel.

Canary's platform provides instant, personalized responses to guest inquiries across calls, texts, and webchat. It manages millions of guest interactions end-to-end, automatically responding to >80% of requests. Both staff and guests feel the impact: average response times drop from 45 minutes to under 2 minutes, responses are accurate and on brand, and staff no longer need to answer repetitive questions dozens of times per day.

Efficiency gains are complemented with revenue gains. AI automatically surfaces highly relevant upsell opportunities within the context of the conversation to deliver the right upsell, to the right guest, at the right time. Hotels see 4x increase in upsell revenue, powered by AI.

AI communications also delights guests. Each guest gets instant replies, personalized recommendations, on their device 24/7 via their chosen channel with responses auto-translation in 100+ languages. Canary's platform is meeting the rising demands of digital-first travelers.

Canary's Omnichannel AI is a win-win-win for hotels: reduced operational friction, more revenue, and a better guest experience – all at scale.

www.canarytechnologies.com/products/hospitality-ai

PRICING

Per room

USER BASE

20k in 120+ countries

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Fully-Autonomous

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | NLU / Sentiment

CONNECTIVITY

Connections with PMS, CRS, CRM, Service Optimization

COMPANY

Canary Technologies — San Francisco, United States
www.canarytechnologies.com

FUNDING STAGE

Mature Non-VC

PROOF POINTS

Guest inquires automatically handled:

>80%

More upsell conversions from Canary AI rollouts

4x

Lift in guest satisfaction scores from Canary AI rollouts

5%

Amanda McDowell
amcdowell@canarytechnologies.com
www.linkedin.com/in/amanda-mcdowell

Cendyn

Cendyn Wayfinder

See, shape, and protect how your hotel appears in AI-led discovery

Data & Analytics | Distribution | Guest Experience | Sales & Marketing

ABOUT THIS PRODUCT

Guests now ask AI platforms about properties before they ever see a search result, and AI answers whether hotels are managing that conversation or not. For most properties today, that conversation is happening out of sight.

Cendyn Wayfinder is a GEO analytics and AI monitoring layer built into the Cendyn Web CMS. It gives hotel teams visibility into what AI assistants say about their property and helps them manage their website content for that new reality; the same way they manage SEO.

Wayfinder has three components:

The Fact Engine pulls structured property data from the CMS and scans it weekly across multiple AI models, comparing each response against the hotel's source content. When a model answer diverges from what the website says, the fact is flagged, and the team is directed to the right place in the CMS to fix it.

The Prompt Library lets operators run simulated guest queries, showing how a property appears in AI conversations against a configurable competitive set (OTAs and competitors). It surfaces where a hotel's content may not be reaching AI effectively, so teams know what to focus on.

Agent Directives are LLM-readable files hosted on the hotel's own domain, a mechanism for signaling brand voice, constraints, and authoritative content to AI crawlers. It also enables more detailed information that lives beyond the website—structured specifically for LLMs.

The underlying standards are still evolving, and Wayfinder is built to move with them.

www.cendyn.com/cendyn-web-wayfinder-lp

PRICING

Usage / token-based

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive

AI CAPABILITY TYPE

Recommendation | Optimization | Conversational AI

CONNECTIVITY

Connects with frontier models to start from Anthropic, Google, OpenAI.

COMPANY

Cendyn™ — Boca Raton, United States
www.cendyn.com

FUNDING STAGE

Mature – Private Equity

Nicola Graham
info@cendyn.com
www.linkedin.com/in/nicolamgraham

FLYR | Hospitality

Optimize + Insights

Moving revenue strategy forward by empowering teams, leveraging data, and unlocking AI value

Revenue Management | Data & Analytics

ABOUT THIS PRODUCT

FLYR Hospitality is a commercial operating system that replaces legacy RMS, rules-based systems, and spreadsheet workflows with one platform, one data layer, and one source of truth. Built on AI from the ground up.

The optimization engines optimize every room type, every hour, across a 24-month horizon, forecasting down to rate code level. Models are trained on each hotel's demand patterns, booking windows, length-of-stay behavior, and segment mix - continuously validated through backtesting, with forecast accuracy metrics visible directly in the platform.

Unlike manual overrides in legacy RMS, Optimize interprets revenue manager inputs as signals of strategic intent, not something the system overrides in the next cycle or treats as fixed values. They are part of the learning process itself, influencing pricing exploration and guiding the scale of moves the engine tests.

You don't fight the system; it adapts to you. No other RMS is built this way.

Every AI price, every room type, every date comes with an explanation: not a static data point, but tailored context on which signals drove that decision and why.

Insights brings the same AI rigor to business intelligence. Any commercial team member can query near real-time data in plain language and get instant answers. Charts and analyses are built on demand — no technical skills required. Automated reports are distributed to any stakeholder on any cadence, directly from the platform.

www.flyrhospitality.com

PRICING

Flat fee per property | Per room

USER BASE

2300+ properties across 60+ countries

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive | Supervised-Autonomous | Fully-Autonomous

AI CAPABILITY TYPE

Conversational AI | Predictive ML | Forecasting | Optimization | Recommendation

CONNECTIVITY

Opera Opera Cloud Cloudbeds StayNTouch Mews Apaleo Shiji Infor Protel Protel Air Res:Harmonics RMS Cloud GuestCentrix Newhotel Clock SynXis Lighthouse RateGain STR Amadeus Demand360

COMPANY

FLYR Hospitality — London, United Kingdom
flyrhospitality.com

FUNDING STAGE

Venture Growth

PROOF POINTS

RevPAR uplift (average across FLYR Hospitality customer base)	Acceptance rate of Optimize AI recommendations	Time from contract signature to live optimization	Reporting time saved per person per week	Portfolio revenue managed per RM vs industry average
12%	**98%**	**2 wk**	**8h**	**5x**

Andrew Rubinacci
andrew.rubinacci@flyr.com
www.linkedin.com/in/andrewrubinacci

hudini

Chat - Powered by Hudini

Every conversation, one unified space.

CRM & Loyalty | Front Office | Guest Experience | Housekeeping | HR & Staffing | Operations & Maintenance | Reservations

ABOUT THIS PRODUCT

Hudini's Chat is a complete guest communication platform built for hotels - across every channel, in every language, with intelligence at every step.

5 communication channels with 1 unified inbox that powers smarter hotel operations including:

- Guest messaging
- Auto ticket assignment
- SLA management
- Analytics and reporting
- Chat allows guests to effortlessly communicate with staff from wherever they are

Whether its special room requests, services or booking a trip or dinner reservation. It is another key avenue guests engage with and allows staff to respond to and address issues rapidly and efficiently. Seamless, automatic, and always-on, Hudini Chat powers change in the way hotels communicate with their guests which can see real impact on brand reputation and guest satisfaction. Hudini AI creates adaptive tone detection and fine-tuned phrasing in real time, allowing enabling consistent and professional tonality across a hotel's digital communication with guests.

hudini.io

PRICING

Per room

USER BASE

Deployed in 150+ hotels

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive | Augmentative | Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Optimization | Recommendation

CONNECTIVITY

Hudini Chat connects with major PMS and POS systems, including OPERA, Infor, Simphony, Infrasys POS, Silverware POS, Actable, Hub OS, Book4Time, SevenRooms, and ResDiary.

COMPANY

Hudini — Hoboken, United States
hudini.io

FUNDING STAGE

Venture Growth

PROOF POINTS

Languages supported with real-time two-way translation	Messaging channels: WhatsApp. Messenger, WeChat, LINE, Instagram and SMS	Single unified inbox	Used by
70+	**5+**	**1x**	**150+ properties**

Prince Thampi
prince@hudini.io
www.linkedin.com/company/mankaratechnologies

inHotel

Agent OS: twins and co-pilots for every hospitality role

Asset Management | CRM & Loyalty | Data & Analytics | Distribution | Email | Finance & Procurement | Food & Beverage | Operations & Maintenance | Sustainability & Energy | Security & Compliance | Meetings & Events | Sales & Marketing | HR & Staffing | Revenue Management | Housekeeping | Guest Experience | Reservations | Reputation & Reviews | Front Office

ABOUT THIS PRODUCT

We ground hospitality operations in expert intelligence, augment human connections, and reduce traditional IT costs by 3X.

Deploying role-specific AI assistants reduces staffing burdens and streamlines complex workflows with robust orchestration.

Hospitality professionals and consultants encode their operational expertise into reusable digital twins and skills, securing workforce relevance for the future.

Industry-Grounded Intelligence: AI agents natively learn comprehensive hospitality best-practices, apply brand standards, enforce policies, and follow SOPs.

Skill Marketplace: A modular repository of operational capabilities contributed by industry experts, priced at 10-15X ROI. Examples: Guest Directory (a QR-based mobile interface handling guest inquiries) and Hotel Group Sales (evaluates group requests against transient demand and profitability gates to generate counter-offers optimized to client psychology). Hotels can turn their own tech into revenue.

Distribution: Reservation agents operate beyond the brand website, representing properties across destination sites, travel agencies, and in emerging agentic networks. Expanded coverage decreases total cost.

Geospatial Grounding: Operator agents integrate with open maps via GERS used by +3 billion people on platforms like Meta, Bing Maps, TomTom navigation, or Uber.

Featuring white-label mobile, web UI, and agentic infrastructure, we help legacy hotel tech partners become instantly AI-native.

www.inhotel.io

PRICING

Freemium | Other | Outcome-based | Flat fee per property

Mirrors traditional hiring: per assistant headcount and skills.

USER BASE

Visionaries and early adopters of actual agents

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive | Augmentative | Supervised-Autonomous

AI CAPABILITY TYPE

Agentic | Generative LLM | Conversational AI | RAG / Search | Document AI | Forecasting | Optimization | Recommendation | NLU / Sentiment

CONNECTIVITY

Our universal API gateway replaces point-to-point connections with a secure, unified integration layer for any OpenAPI / MCP server system (PMS, RMS, CRM, ERP, email, etc.) It scales to hundreds of tools and abstracts complexity for agents to prevent context window overload with zero prompt changes.

COMPANY

InHotel — Geneva, Switzerland
www.inhotel.io

FUNDING STAGE

Early Stage

Jan Popovic
jan@inhotel.io
www.linkedin.com/in/janpopovic

infor

HAP

Hospitality Agentic Platform: AI-orchestration for hotel operations, revenue, sales & guest services

Data & Analytics | Email | Front Office | Housekeeping | Operations & Maintenance | Reservations | Revenue Management | Sales & Marketing

ABOUT THIS PRODUCT

HAP is applied across the full hotel operation (front desk, revenue management, sales & events, F&B, and housekeeping) enabling staff to query systems, execute multi-step workflows, generate reports, coordinate group bookings, analyze photos, and manage guest requests through a single conversational interface instead of navigating multiple tools.

AI Technology Used

Multi-Agent Orchestration - Large Language Models (AWS Bedrock) - RAG Knowledge Retrieval - Real-Time Voice (AWS Nova Sonic) - Image Recognition & Analysis - Intent Classification - Multi-Step Planning - Human-in-the-Loop Approval

How AI is Integrated

HAP is an AI orchestration layer that sits on top of a hotel's existing systems — PMS, POS, Revenue Management, and Sales & Events. Staff interact through a conversational chat widget or voice interface, asking questions or giving instructions in plain language. The AI understands the request, plans the steps needed, calls the right systems, and returns a structured result... all in seconds.

www.infor.com/industries/hospitality

PRICING

Usage / token-based

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive | Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Computer Vision | Speech / Voice | RAG / Search

CONNECTIVITY

Connects to the Infor Hospitality Suite (HMS, SCS, POS, and RMS) plus built-in communication channels including Email, Microsoft Teams, and Telegram. Additional systems can be connected by registering an API specification. No custom code required per integration.

COMPANY

Infor — New York, United States
www.infor.com/industries/hospitality

FUNDING STAGE

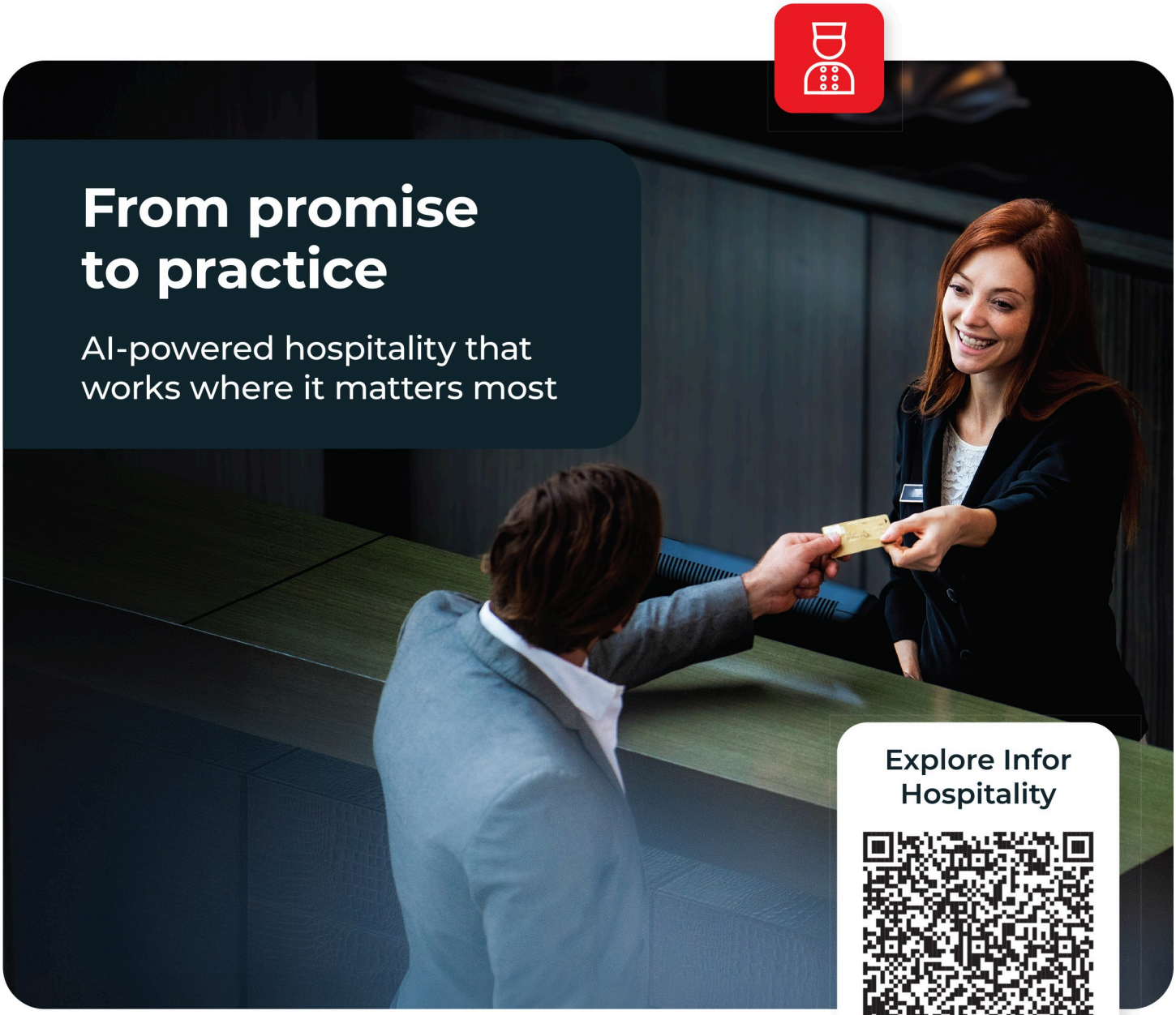
Mature Non-VC

PROOF POINTS

System lookup time (down from ~4min)	Systems accessed in a single conversation	Languages supported	Staff training required	Minutes to add a new system integration
15s	**3-5**	**10+**	**~0**	**<1h**

Alan Young
Alan.Young@infor.com
www.linkedin.com/in/alaneyoung

infor



Data is not the problem—acting on it is.

Infor closes the gap between insight and execution with the Hospitality Agentic Platform, designed for the front desk, the floor, and every system behind them. Through a single conversational interface in chat or voice, staff can query multiple systems, execute workflows, generate reports, and manage guest requests in seconds, not minutes. From a room availability lookup to a group booking, every action is guided, built-in safety ensures human approval when it matters, and no training is required to get started.

This is AI that does not just inform. It acts.

inntelo AI

Inntelo AI

One AI Platform for Guest Experience, Operations and Customer Data

Guest Experience | Housekeeping | Operations & Maintenance | Data & Analytics | Front Office | Food & Beverage

ABOUT THIS PRODUCT

Inntelo AI is built AI-native, bringing together guest experience, operations and customer data into one platform and a single source of truth.

Rather than bolting a chatbot onto existing tools, Inntelo AI runs the full guest journey with AI agents built for hospitality. These agents handle bookings, arrival, in-stay and departure across messaging channels such as WhatsApp, phone calls and web chat, in the guest's preferred language. But conversations are only the start: Inntelo AI turns interactions into actions, routing every request, question and issue into operational workflows through built-in modules for task management, guest experience, housekeeping and engineering, so the right team can act in real time.

Every interaction then feeds rich 360° guest profiles, powered by a built-in Customer Data Platform, fuelling personalisation, campaigns and AI upselling. The result is a connected system of record that turns guest conversations into actions, insights and revenue.

www.inntelo.com

PRICING

Per room

Inntelo AI is a modular platform giving hotels flexibility on which modules to deploy.

USER BASE

25,000+ Rooms Across EMEA including the World's Tallest Hotel, CIEL Dubai Marina

AVAILABILITY

Global | Americas | Europe | Middle East | Africa | Asia-Pacific

Inntelo AI is Headquartered in the UK with offices in Switzerland and Dubai. In May 2026 Inntelo AI announced its expansion into North America.

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Supervised-Autonomous

Fully-Autonomous

AI CAPABILITY TYPE

Conversational AI | Agentic | Recommendation | Forecasting | Computer Vision | Speech / Voice | RAG / Search | NLU / Sentiment | Optimization

CONNECTIVITY

Inntelo AI connects with Oracle's OPERA Cloud and other leading PMS and POS solutions, alongside payment, door-lock and marketing systems, so it operates as one source of truth across your existing stack.

COMPANY

Inntelo AI — London, United Kingdom
www.inntelo.com

FUNDING STAGE

Venture Growth

PROOF POINTS

Guest interactions fully automated:

98%

Time saved per guest enquiry:

17 min

Uplift in in-stay revenue:

32%

Largest hotel user:

1,004 rooms

Tariq Valani
tariq@inntelo.com
www.linkedin.com/in/tariqvalani

Juyo

Juyo Pro

Hospitality Intelligence Platform that moves at hotel speed. Built by hoteliers for hoteliers.

Asset Management | CRM & Loyalty | Data & Analytics | Distribution | Finance & Procurement | Food & Beverage | Front Office | Operations & Maintenance | Reputation & Reviews | Reservations | Revenue Management | Sales & Marketing

ABOUT THIS PRODUCT

Juyo is the AI-native hospitality intelligence platform built by hoteliers for hoteliers. It connects your stack and market intel into one reconciled source of truth for commercial, finance, and operations leaders. Juyo Pro is designed for commercial groups and multi-property operators. It bundles unlimited dashboards, comp set benchmarking, P&L visibility, pickup and pace, forecast variance, portfolio view, multi-user collaboration, and smart alerts. HotelGPT and Kassandra AI are included.

HotelGPT is the chat-native layer where a hotelier asks a question in plain language and gets a defensible answer in seconds. Kassandra AI is the hospitality reasoning agent powering it, trained on rate efficiency, displacement, flowthrough, GOP conversion, labour productivity by occupancy band. In practice, the Commercial Director, Revenue Director, CFO, and GM work off one canvas across the portfolio. They ask Kassandra AI a question; HotelGPT returns the chart, the cause, and the recommended next move. The morning meeting opens with the decision, not data reconciliation.

juyo.ai

PRICING

Per room | Usage / token-based

USER BASE

1,500+ hotels

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Augmentative | Assistive

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Predictive ML | Forecasting | Optimization | Recommendation | Speech / Voice | Document AI

CONNECTIVITY

PMS: Apaleo, Guestline, Hilton, HotelKey, infor, Mews, Opera V5, Opera Cloud, Oracle, Shiji, StayNTouch | Finance: Fairmas, IBM Cognos, Microsoft Dynamics NAV | POS: Micros Simphony | RMS: Duetto, Ideas | M&E: Delphi, EventTemple, OSEM, Thynk | Other: Benchmarking Alliance, Lighthouse, MKG Group

COMPANY

Juyo Analytics — Brussels, Belgium
www.juyoanalytics.com

FUNDING STAGE

Mature Non-VC

PROOF POINTS

Saves Revenue Managers up to
10 hrs/week

Time to insight reduced to
3 min

Hotel Groups manage an average of
17 properties

Bram van Berkel
bram@juyo.ai
www.linkedin.com/in/bramvanberkel

lighthouse

Ernest

Hospitality AI that connects existing data and systems in a single chat interface to supercharge team productivity

Asset Management | CRM & Loyalty | Distribution | Data & Analytics | Email | Food & Beverage | Finance & Procurement | Revenue Management | Sales & Marketing | Sustainability & Energy

ABOUT THIS PRODUCT

Hotel commercial teams run strategy across disconnected systems. Rate shopping in one tool, demand data in another, competitive benchmarking somewhere else. By the time you connect the dots and make adjustments to your channels, many opportunities have already disappeared.

Ernest is Lighthouse's AI and the newest member of your hotel's commercial team. Ask a question. Get a recommendation grounded in your competitive landscape, demand signals and performance data, with the reasoning behind it. Act without switching tools and automate the busy work your team handles every week. Ernest creates one AI Workspace with all the context you need to ask, decide and act.

Ernest is built on the same Lighthouse Commercial Operating Platform that powers 80,000 hotels in 185 countries. He starts with foundational hospitality intelligence that general AI can't match, learns your KPIs, market trends and operational preferences, and gets smarter over time. But unlike a human, Ernest never forgets.

Ernest handles the daily busywork of data gathering, report compilation and tool-switching so you can focus on what matters. Commercial teams want to make an impact, not check boxes on a list.

With Ernest, now you can.

askernest.ai

PRICING

Other

Pricing scales with portfolio size and the modules you activate. Reach out and we'll put together a tailored proposal.

USER BASE

Ernest is in active development with a select group of pilot hotels.

AVAILABILITY

Global

Ernest will have global availability. Join the waitlist at http://askernest.ai/ for early access. Waitlist members get product updates as we get closer, and priority access when we open the doors.

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Predictive ML | Forecasting | Optimization | Recommendation | Document AI

CONNECTIVITY

Ernest works with your existing Lighthouse data and connects with the major systems used across the industry. The list of connections will keep growing.

COMPANY

Lighthouse — London, United Kingdom
www.mylighthouse.com

FUNDING STAGE

Venture Growth

Adam Swart
adam.swart@mylighthouse.com
www.linkedin.com/in/adamswart

Lobby

Lobby

Automating complex bookings with AI: Groups, events, contracted rates and more

Reservations | Distribution | Email | Sales & Marketing | Revenue Management

ABOUT THIS PRODUCT

Groups, tour operators, events, contracted rates, modifications, rooming lists, billing changes: they still eat countless hours and cost you revenue and conversions. Requests often arrive by email, PDF, or extranet, forcing staff to manually cross-check contracts, allotments, rates, and availability. It is slow, error-prone, and hard to scale. This is where Lobby comes in.

- A quote for a wedding for 300 with catering? No problem.
- 12 rooms from allotment plus 3 outside the contract? No problem.
- Cancel 2 of 8 room types and re-price the rest? No problem.

How does it work? Lobby reads each request wherever it lands, pulls the relevant data from your contracts, rate plans, and internal systems (PMS, CRS, event and catering), then drafts a reply and suggests the next step, in any language. Run it fully autonomously or with a human in the loop. Since change is hard to roll out, Lobby works where your team already does, through a simple extension on top of the tools they use every day. The result? The fastest, most complete answer wins the deal and earns more partner allocation. No more margin lost to wrong rates or missed contract terms, and you scale without adding headcount.

Who is it for? Reservation and sales teams at hotel groups, management companies, and call centers, who handle high volumes of group, partner, and event requests. As they grow their portfolios, they need to centralize complex workflows across fragmented brand systems, PMS, and other platforms.

joinlobby.com

PRICING

Outcome-based | Flat fee per property | Usage / token-based

Pricing based on automation volume

USER BASE

30+ Hotels, 1 white labelling partner

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Fully-Autonomous

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Agentic | NLU / Sentiment | RAG / Search | Document AI

CONNECTIVITY

Connects with any PMS and channel (e.g. OHIP, Protel, Mews, Apaleo, plus Gmail and Outlook for email), via direct integration or by working through the existing interface like your team would. New connection takes days, not weeks.

COMPANY

Lobby — Zurich, Switzerland
www.joinlobby.com

FUNDING STAGE

Early Stage

PROOF POINTS

Reduces response time by	Increases conversion by	Saves per agent daily	Raised in pre-seed
-75%	**+15%**	**2h**	**USD 2.2M**

Romy Abbrederis
romy@joinlobby.com
www.linkedin.com/in/romy-abbrederis

MEWS

Mews Guest Messaging

One place to manage every conversation, with AI handling the routine.

Guest Experience | Front Office

ABOUT THIS PRODUCT

According to internal research with Mews PMS customers, hotel operations teams typically check five to seven platforms every day to keep up with guest messages: the property management system, OTA portals, WhatsApp Business, SMS and others. The fragmentation leaves gaps where messages slip through and responses become inconsistent. Third-party messaging tools, which connect to the PMS through an API, don't solve this either. Hotels still need to switch between systems to reply, and the guest data they surface is often incomplete and out of date.

Mews Guest Messaging solves this at the source. Built directly into the Mews Operating System, it brings SMS, WhatsApp and OTA messages into a single inbox connected in real time to the guest profile and reservation. There is no separate login, no subscription and no switching between platforms. AI suggests replies using the hotel's own knowledge base and can create tasks automatically based on the context of a message, so the right person is flagged to act without anyone having to manually triage. Staff spend less time on repetitive questions and more time on the interactions that matter. Because the product is native to Mews rather than integrated via API, the guest data available to every conversation is always current, with room type, reservation status, special requests and stay history visible the moment a message arrives.

www.mews.com/en

PRICING

Per room

Included on PMS subscription with Whatsapp and SMS messages being charged.

USER BASE

The product was just announced.

AVAILABILITY

Global | Americas | Europe

Global - wherever Mews is available.

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM

CONNECTIVITY

Native to Mews PMS. Connects with WhatsApp Business and Booking.com at launch, with other OTAs and integration partners to be added over time.

COMPANY

Mews — London, United Kingdom
mews.com/en

FUNDING STAGE

Venture Growth

Mews
www.linkedin.com/company/mewssystems

mirai

Mirai AI Infrastructure

A unified architecture designed from the ground up for the conversational and agentic era

Reservations | Distribution | Data & Analytics

ABOUT THIS PRODUCT

Mirai AI Infrastructure is a conversational and agentic architecture built natively on top of Mirai's direct-booking stack — not a chatbot added to the website. Its core is a reservation engine that has evolved to quote, book, modify and cancel inside a natural-language conversation, in text or voice and in up to 100 languages.

The architecture has five coordinated layers: the conversational booking engine; Knowledge, the hotel's canonical content database; Sarai, the conversational assistant that understands and responds to guests; Lobby, a control layer for monitoring, human hand-off, analytics and continuous improvement; and an MCP layer that exposes the hotel's content, availability and booking functions to external assistants such as ChatGPT, Gemini or Claude as that ecosystem matures.

Because every interface runs on the same inventory, pricing and rules, the guest gets one coherent experience across web, WhatsApp, voice and external agents. The same booking engine that answers a question about parking can close a same-day booking, without redirecting the user to a separate form. The AI runs autonomously in the large majority of cases; the hotel keeps full visibility and can step in whenever a conversation requires it.

www.mirai.com/blog/mirai-launches-its-ai-infrastructure-with-a-native-conversational-booking-engine

PRICING

Outcome-based | Flat fee per property

USER BASE

300+ hotels live on the conversational booking engine, within months of launch

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Fully-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | RAG / Search | Speech / Voice

CONNECTIVITY

Integrates with 45+ PMSs and channel managers, including Oracle OPERA, Mews, SiteMinder and Amadeus. Runs natively on Mirai's booking engine across web, WhatsApp and voice, and exposes content, availability and booking to external AI assistants via MCP.

COMPANY

Mirai — Madrid, Spain
www.mirai.com

FUNDING STAGE

Mature Non-VC

PROOF POINTS

300 hotels live and 1,000+ in onboarding, within months of launch

Over 90 days, 27,500+ hours of guest conversation handled autonomously, with under 0.5% requiring human intervention

In a recent week, 4.4% of conversations with booking intent ended in a created reservation, and roughly 1 in 2 guests who reached the data-capture step completed one

Two hotels live as approved apps in the ChatGPT app directory, built on Mirai's MCP infrastructure, with more under review by OpenAI

3.8/5 average guest satisfaction across 80,000+ rated AI conversations

Pablo Delgado
pablo.delgado@mirai.com
www.linkedin.com/in/pablodelgadodiazpache

Opally

Opally

AI receptionist for hotels, grounded in your knowledge, live availability, and brand voice.

Guest Experience | Front Office | Email | Reservations

ABOUT THIS PRODUCT

Opally is an AI receptionist for hotels: it reads guest requests across email, website chat, voice and messaging, then answers from the hotel's own knowledge, tone of voice and live operational data.

Behind each response, Opally combines language models with retrieval from the hotel's knowledge base and tool access to systems such as Gmail, Outlook and PMS/booking engines. A guest asking about availability can get a reply grounded in real rates and room inventory; a returning guest can be answered with context from their profile and booking history; a policy question can be answered from approved hotel documents rather than generic internet knowledge.

The autonomy is configurable. Email usually starts as an AI draft for staff to review and send. Low-risk actions such as checking availability can run automatically, while booking changes, cancellations and other write operations can be gated by confidence thresholds and hotel settings. Opally learns from staff edits and approvals so future replies better match the property's phrasing, policies and service style.

opally.com

PRICING

Per room

Starts at €4/room/month; enterprise pricing available for hotel groups and multi-property portfolios.

USER BASE

50+ hotels in 5 countries

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Augmentative | Fully-Autonomous

AI CAPABILITY TYPE

Generative LLM | Agentic | Speech / Voice | Conversational AI | RAG / Search

CONNECTIVITY

Connects with Gmail, Outlook, Mews, Apaleo, hBook, BookVisit, SynXis, Opera Cloud, SiteMinder, Amadeus iHotelier, GuestCentric, Spectra, WebHotelier, Resos/EasyTable, Kleesto, Meta channels, voice AI and Google Tag Manager.

COMPANY

Opally — Copenhagen, Denmark
opally.com

FUNDING STAGE

Early Stage

PROOF POINTS

Admin time saved on guest communication	Receptionist time saved per week for hotel customers	Typical onboarding time	Hotel properties using Opally	Languages supported with automatic detection
70%	**12h**	**1d**	**50**	**25**

Gustav Søgård
gustav@opally.com
www.linkedin.com/in/gustavsogard

OTEL

Otel AI

The AI co-worker for hotel teams

Asset Management | Data & Analytics | Finance & Procurement | Food & Beverage | Front Office | Housekeeping | HR & Staffing | Operations & Maintenance | Reputation & Reviews | Reservations | Revenue Management | Sales & Marketing

ABOUT THIS PRODUCT

Hotel teams already know what to do. They just don't have the hours to check every system, every date, every morning. Otel AI is the AI co-worker built exclusively for hotels. It connects PMS, RMS, POS, payroll, comp set, procurement and more into one layer that runs around the clock, automating the manual work your team does today, spotting revenue and cost they'd otherwise miss, and handing hours back every morning. Instead of working in bursts on manual checks, reports, and spreadsheets, Otel runs continuously, watching every system, understanding your hotel's rules and context, and turning what's changing into action before it's a problem. To your team, Otel feels like one co-worker. Behind the scenes, specialised AI agents (revenue, operations, payroll, procurement, guest experience) share context, check each other's work, and bring the right answer or the finished job to the right person.

That's the difference between a chatbot and a co-worker. A chatbot waits to be asked. Otel watches the operation, acts on your rules, and reports back when it's done. And it's not a black box. Every answer comes from your own systems, traceable to source, reasoned like a GM or revenue manager. Every decision builds the hotel's operating memory: rate codes, segments, how each property runs. Knowledge doesn't walk out the door when people move on. Onboarded in 3 hours. Connected to 100+ systems: Opera, Guestline, IDeaS, Duetto, Lighthouse, STR.

www.otelai.com

PRICING

Per room

USER BASE

Owners, General Managers, Revenue Managers and hotel team leaders.

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Recommendation | NLU / Sentiment | RAG / Search | Document AI | Agentic

CONNECTIVITY

Otel AI works with the systems you already trust, and is connected to 100+ hotel systems and counting, including Opera, Guestline, IDeaS, Duetto, Lighthouse, and STR. No rip-and-replace; we match the integration method to what your source system supports; API connection or automated data sync.

COMPANY

Otel AI — Dublin, Ireland
otelai.com

FUNDING STAGE

Early Stage

PROOF POINTS

Revenue teams save	General Managers save	Average increase in pricing decisions made per month	Average increase in actions made and decisions taken	Average RevPAR increase in first 3 months
20+ hrs/week	**10+ hrs/week**	**5-10x**	**200%**	**8.6%**

Paul Ryan
paul@otelai.com
www.linkedin.com/in/paul-ryan-aa437433

Paathz

Paathz

The intelligent workforce platform built for hospitality

HR & Staffing | Operations & Maintenance

ABOUT THIS PRODUCT

Paathz is the workforce intelligence platform built specifically for hospitality. It powers the hospitality talent funnel by helping employers source, screen, rank, interview and onboard candidates across single properties, regional groups and global chains.

Paathz is not a chatbot added on top of an ATS. It is an intelligent talent layer that sits across your entire hiring stack - HRIS, PMS, ATS - and runs the recruitment workflow end-to-end. Paathz helps hospitality employers move from reactive hiring to faster, more structured and more precise talent decisions.

Paathz helps employers understand hospitality talent beyond the limitations of a traditional CV. When a candidate submits a CV, video answer or referral, the platform converts that information into a structured profile covering skills, experience, certifications, availability, mobility and career preferences. These signals are then matched against open roles across the organization, with hospitality-specific context such as department requirements, property type, brand standards and operational needs. The result is a clearer, more relevant view of candidate fit, helping employers identify talent who are not only qualified on paper, but aligned with the realities of the role and the property.

We understand what legacy systems miss. We surface who generic platforms overlook. Hospitality does not have a labour shortage, it has a visibility problem.

paathz.com

PRICING

Other

Subscription per Organization

USER BASE

650+ hotels and restaurants in 4 countries

AVAILABILITY

Europe | Asia-Pacific | Middle East

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Assistive | Augmentative

AI CAPABILITY TYPE

Generative LLM | RAG / Search | Recommendation | NLU / Sentiment | Document AI | Speech / Voice | Computer Vision | Optimization | Predictive ML | Forecasting

CONNECTIVITY

Connectors for every major HRMS and ATS systems.

COMPANY

Paathz — Singapore, Singapore
paathz.com

FUNDING STAGE

Early Stage

PROOF POINTS

Cuts time-to-shortlist by up to	Screens a candidate in as little as	Lifts qualified-hire conversion by up to	New integrations go live in just	Full onboarding done in as little as
75%	**30s**	**15%**	**4d**	**2d**

Jan Jansen
Jan@paathz.com
www.linkedin.com/in/janjansenhospitality

Parclane

Parclane

The intelligent prospecting platform for hospitality

Sales & Marketing | Meetings & Events | Email | CRM & Loyalty

ABOUT THIS PRODUCT

Every hotel sales leader knows the same truth: prospecting is always the first thing to fall off the desk. The phone rings. Monday morning fires hit. RFPs need responses. And the outbound activity that actually builds pipeline doesn't get done. Meanwhile, the sales & catering system contains years of buyer data that's decaying — contacts paid to acquire through events, representation programs, and years of relationship building. That investment is depreciating while the hotel keeps paying to acquire new business through the same expensive channels.

Parclane closes the gap. The platform activates that data and runs personalized campaigns in the background, sent in each seller's voice, from their name, on their behalf. It creates a volume of sales activities that can't be replicated manually.

The AI does the thinking: who to reach, what to say, when to say it. It reads each hotel's data: past bookings, planner behavior, RFP cycles, group-on-peak dynamics. It scores buyer intent at scale, matches net-new planner contacts to each property's profile, generates personalized outreach, and learns the language that earns a planner's reply. The work happens every day, at the same quality and cadence, regardless of staff turnover or seller bandwidth.

Sellers don't log in. They focus on proposing and closing, putting their labor to its highest and best use.

parclane.ai

PRICING

Flat fee per property | Outcome-based

USER BASE

100+ hotels

AVAILABILITY

Global

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Supervised-Autonomous

Fully-Autonomous

AI CAPABILITY TYPE

Generative LLM | Predictive ML | Optimization | NLU / Sentiment | Recommendation | RAG / Search | Agentic | Document AI

CONNECTIVITY

Works with data from any sales & catering system, PMS, or RFP management tool. No API integration required, though available on request. Secure data handoff is all that's required to activate the platform within 7 days.

COMPANY

Parclane — New York, United States
parclane.ai

FUNDING STAGE

Mature Non-VC

PROOF POINTS

- Rapid time to value: prospecting can go live within 7 days of data handoff
- 50+ personalized prospecting activities per seller per business day
- 2 formal RFPs received within 72 hours of launching on the platform
- 21x average return on platform investment

Daniel Melnyk
daniel.melnyk@parclane.ai
www.linkedin.com/in/danielmelnyk

REVINATE

Revinate Ivy

Put your guest data to work with hospitality-specific automation

CRM & Loyalty | Guest Experience | Reservations | Email | Sales & Marketing

ABOUT THIS PRODUCT

Ivy is the intelligence built across our entire platform.

She is trained on 17 years of hospitality data and one billion guest profiles, giving her a deeper understanding of guest behavior than any other tool. While Ivy uses this massive scale to learn how to anticipate needs, she operates within a secure, encrypted environment to keep your specific guest data private and safe. Today, Ivy handles tasks like scoring staff calls and answering guest questions. Soon, she will identify hidden revenue opportunities and run your marketing campaigns automatically. Ivy handles the digital labor so your team can focus on your guests.

revinate.com/hotel-software/revinate-chat

PRICING

Other

Contact for pricing

USER BASE

12,500+ hotels in 128 countries

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Assistive

AI CAPABILITY TYPE

Agentic

CONNECTIVITY

Our 100+ integration, technology, and advocacy partners give hoteliers superpowers. By syncing millions of data points and using smart tech solutions, they help maximize profit, drive guest satisfaction, and transform the industry with data-rooted decisions.

COMPANY

Revinate, Inc. — Bend, United States
www.revinate.com

FUNDING STAGE

Venture Growth

PROOF POINTS

OTA profiles merged with existing guest records	Accuracy against scored calls with Automated Call Scoring	Hours of your month back with Automated Call Scoring	Reduction in customer service costs with Revinate Chat
1 Million	**96%**	**30h**	**80%**

Revinate, Inc.
media@revinate.com
www.linkedin.com/company/revinate

roomangel.

hive

The Performance Brain for Hotels.

Asset Management | Data & Analytics | Distribution | Finance & Procurement | Guest Experience | Revenue Management | Sales & Marketing | HR & Staffing | Reputation & Reviews | Meetings & Events | CRM & Loyalty | Reservations | Sustainability & Energy | Food & Beverage | Email | Front Office

ABOUT THIS PRODUCT

Hotels do not need another dashboard. They need their technology to finally work together.

For years, hotel teams have been forced to make critical commercial decisions from fragmented systems, disconnected reports and incomplete signals. The result is slower decision-making, missed demand, wasted spend and too much manual work.

hive is designed to change that.

Sitting above a hotel's existing PMS, RMS, BI, CRM, marketing and finance tools, hive connects the systems that usually operate in isolation and turns them into one intelligent commercial layer. Rather than asking hotels to rip out and replace their tech stack, hive makes the stack work harder — helping revenue, marketing, commercial and leadership teams move from static reporting to live insight, faster decisions and smarter action.

hive RaaS turns intelligence into measurable demand. By funding demand-generation activity upfront and charging only on results delivered, it removes media risk while helping hotels capture high-intent, long-tail demand that traditional campaigns often miss.

With the hive ADK, hotel groups, partners and consultants can create bespoke hospitality tools without writing a single line of code. By describing what they need in natural language, teams can rapidly build mini-apps, smart agents and custom solutions on top of hive's intelligence layer.

hive gives hotels one connected layer of intelligence that turns data into decisions, and decisions into action.

www.assetware.ai

PRICING

Flat fee per property

USER BASE

Built for hotel groups, independent hotels, operators and hospitality partners globally.

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Fully-Autonomous

Supervised-Autonomous | Assistive

AI CAPABILITY TYPE

Agentic | Generative LLM | Conversational AI | Recommendation | Predictive ML | Forecasting | Optimization | Document AI | RAG / Search | NLU / Sentiment

CONNECTIVITY

Designed to connect with any system in your hotel tech stack, from PMS, RMS and CRM to BI, marketing, finance and bespoke internal tools.

COMPANY

roomangel — Dubai, United Arab Emirates
www.roomangel.com

FUNDING STAGE

Mature Non-VC

Daniel Reeves
daniel@roomangel.com
www.linkedin.com/in/danielreeves1

SiteMinder

Dynamic Revenue Plus

Power your revenue and distribution strategy with confidence

Revenue Management | Data & Analytics | Distribution | Sales & Marketing

ABOUT THIS PRODUCT

Running a hotel means wearing multiple hats. Between managing guests, staff, operations and distribution, most hoteliers have little time left to do what revenue management actually demands: monitoring competitor rates, tracking local events, interpreting market trends, and translating all of it into timely pricing or distribution decisions. Dynamic Revenue Plus was built for that reality. It combines IDeaS-powered pricing recommendations with SiteMinder iQ, SiteMinder's proprietary AI engine trained on data from over 300 million annual room night reservations processed across the platform. Together, they give independent properties something previously reserved for large hotel chains: a continuously updated, AI-driven view of their market, paired with the ability to act on it immediately. In practice, that means daily pricing recommendations generated from actual booking data and real-time market demand, an AI-summarised view of every Insights report so hoteliers always know where to focus, a 90-day demand forecast with market pace indicators (Ahead, Behind, or On Pace against the destination market), destination market intelligence that benchmarks property performance against an anonymised aggregate of all hotels in the local market, and automated competitor set management that uses machine learning to keep competitor sets current as the market evolves.

www.siteminder.com/dynamic-revenue-plus

PRICING

Other

Commission-based

USER BASE

20,000 rooms

AVAILABILITY

Global

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Fully-Autonomous

Supervised-Autonomous | Assistive

AI CAPABILITY TYPE

Predictive ML | Forecasting

Recommendation | Optimization

CONNECTIVITY

Powered by IDeaS' pricing algorithms and connected to your existing hotel technology stack

COMPANY

SiteMinder — Millers Point, Australia
www.siteminder.com

FUNDING STAGE

Public

PROOF POINTS

Hoteliers using Dynamic Revenue Plus save an average of 24 hours per month through pricing automation

6 hrs/week

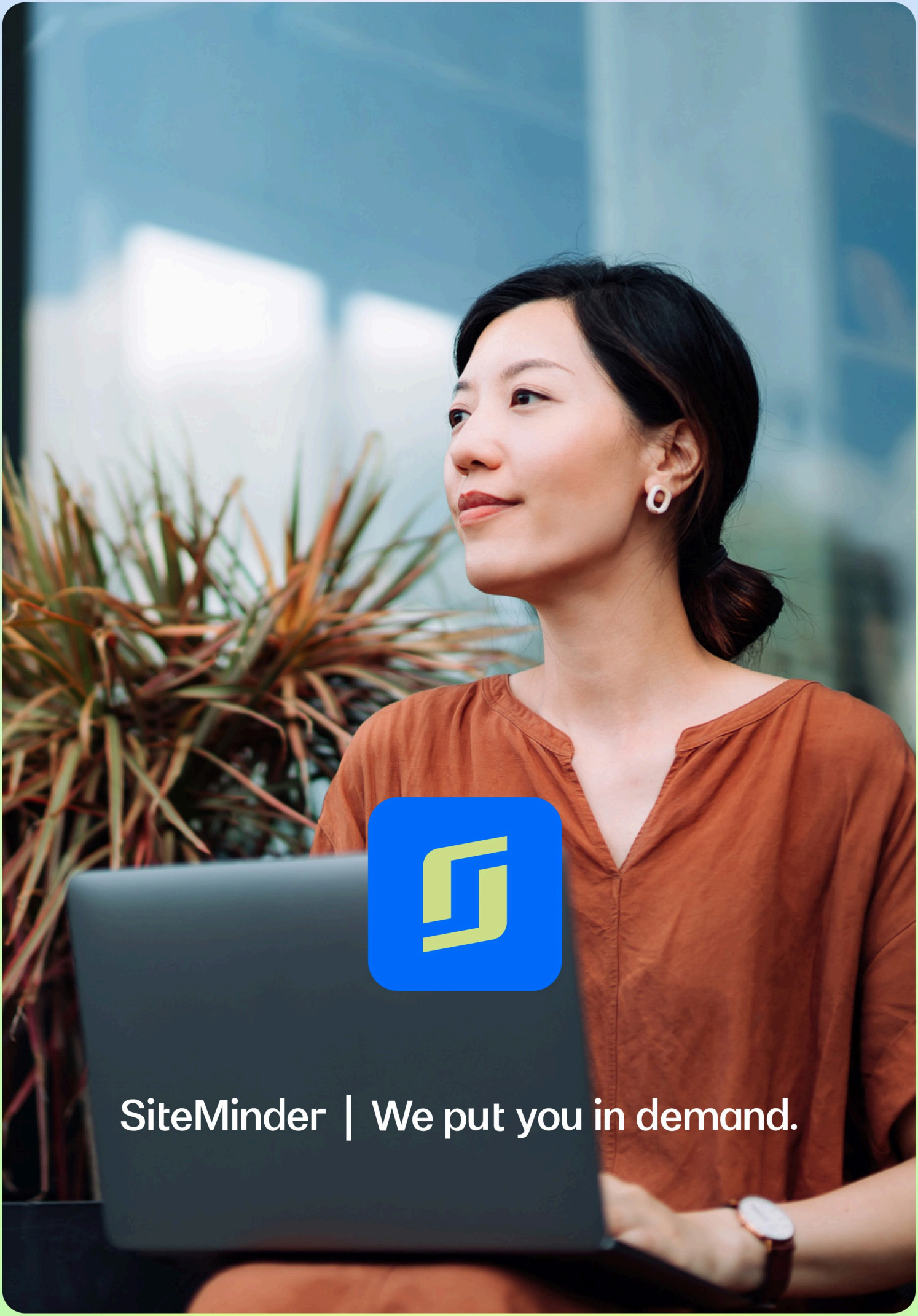
Forecasting delivers consistently high short-term accuracy, with forecasts 7 days out typically 85–90% accurate

85-90%

"It's a no-brainer. Dynamic Revenue Plus saves me at least 1.5-2 hours a day in front of the computer. I can offload some of that work and run price checks up to six times a day." - Admirals Motor Inn

"I like diving into the Booking Performance and Pace reports by channel and market segmentation. Having this in detail has certainly helped. I look at these reports on a daily basis." - Waymark Hotels

Andrea Lee
andrea.lee@siteminder.com
www.linkedin.com/in/andrea-lee-13982285


SiteMinder | We put you in demand.

SOJERN

Sojern Marketing Platform

The AI-powered travel marketing and guest experience platform built for hospitality

CRM & Loyalty | Data & Analytics | Guest Experience | Email | Reputation & Reviews | Reservations | Revenue Management | Sales & Marketing | Housekeeping

ABOUT THIS PRODUCT

Sojern is the leading AI-powered marketing platform built to drive revenue and elevate guest experience across the entire stay journey. On the marketing side, Sojern draws on the world's largest travel intent database—refreshed 800 million times per day—to help hotels find, attract, convert, and convert travelers through multichannel activation across search, social, display, metasearch, and connected TV. Rather than guessing at audience behavior, the platform responds to real-time intent signals, linking advertising and email data to booking behavior to reach travelers where they actually are in their journey. Beyond acquisition, Sojern's Guest Experience Platform, including AI Concierge, goes beyond guest messaging by intelligently routing requests, automating upsell opportunities, and providing personalized service across multiple channels—delivering 24/7 support via SMS, WhatsApp, chatbots, and mobile apps, reducing front desk inquiries by over 85%. Reputation Manager closes the loop, using AI to monitor and respond to guest feedback and turning review signals into a live operational input rather than a post-stay afterthought. More than 13,000 hospitality customers worldwide rely on Sojern to connect the commercial and experiential sides of their business.

www.sojern.com

PRICING

Other

SaaS; Commission, Managed Platform

USER BASE

13K+ hospitality customers around the world

AVAILABILITY

Global

Sojern is headquartered in San Francisco, California, with teams in the Americas, Europe, Middle East and Africa, and Asia Pacific.

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Assistive | Augmentative | Supervised-Autonomous | Fully-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Predictive ML | Forecasting | Optimization | Recommendation

CONNECTIVITY

Sojern's platform integrates with top PMS partners, including ChoiceADVANTAGE, Mews, OPERA Cloud, HotelKey, Visual Matrix, Cloudbeds, etc., to enhance guest experiences without disrupting operations.

COMPANY

Sojern — San Francisco, United States
www.sojern.com

FUNDING STAGE

Sojern was acquired by RateGain in 2025

PROOF POINTS

Boost in ancillary revenue via AI Concierge	In-stay guest issues resolved before checkout via Reputation Manager	Reduction in front desk calls via AI Concierge	Million audience signals refreshed every day	Million predictions made daily using proprietary machine learning
300%	**85%**	**80%**	**800**	**100**

Kurt Weinsheimer

kurt.weinsheimer@sojern.com

www.linkedin.com/in/kurt-weinsheimer-287ba7

TRUSTYOU

Hospitality's New Memory

Know your guest: what they feel (CXP), what they do (CDP), what they ask (TrustYou Agent)

Reputation & Reviews | Guest Experience | CRM & Loyalty | Data & Analytics | Sales & Marketing

ABOUT THIS PRODUCT

TrustYou is Hospitality's New Memory — the AI-native platform that unifies what guests feel, do, and ask, in one connected system.

For nearly two decades, we've helped over 100,000 hospitality businesses across 165 countries turn fragmented guest data into one connected story. Today, that story lives across three interconnected memories that work as one.

CXP — the memory of experience. Reviews, surveys, sentiment, and reputation are captured and activated across every guest touchpoint. Remembers everything about your guests' stay.

CDP — the memory of the customer. A single guest profile built from every booking, every channel, and every interaction — the foundation for personalized, direct-channel marketing that converts. Remembers all transactional data about each guest, stored in a single golden profile.

TrustYou Agent — the memory of conversations. One AI agent across every channel, live 24/7 in every language. Built on top of CXP and CDP, the agent knows who the guest is, what they've felt, and what they've asked before. Remembers every conversation.

Unlike point solutions that solve one piece of the puzzle, TrustYou connects reputation, guest data, and AI-powered messaging. Every interaction updates the memory automatically, so every message a hotel sends is smarter than the last.

Competitors' tools respond. Ours remembers.

www.trustyou.com

PRICING

Flat fee per property | Per user

USER BASE

100,000+ properties across 165 countries

AVAILABILITY

Global

PRODUCT TYPE

AI-Native

AUTONOMY LEVEL

Supervised-Autonomous

AI CAPABILITY TYPE

Generative LLM | Conversational AI | Agentic | Predictive ML | NLU / Sentiment | RAG / Search

CONNECTIVITY

Native integrations with 40+ PMSs and channels, including Opera Cloud, Mews, Apaleo, Protel, Sihot, Booking.com, Google, and Expedia. AI Agent connects to WhatsApp, email, website chat, Zendesk, and Microsoft Teams across 30+ languages. Mailchimp and HubSpot for marketing activation.

COMPANY

TrustYou — Munich, Germany
www.trustyou.com

FUNDING STAGE

Mature Non-VC

PROOF POINTS

AI Agent inquiry resolution rate

95%

Review response rate (vs. ~37% city avg)

98%

Lifts direct-booking conversion by

5%

Properties live across 165 countries

100K+ properties

Jonty Hapeta
jonty.hapeta@trustyou.net
www.linkedin.com/in/jonty-hapeta

TRYBE

Trybe Intelligence

Smarter revenue. Seamless conversations.

Guest Experience | Reservations | Revenue Management | Operations & Maintenance

ABOUT THIS PRODUCT

As AI becomes embedded across the hospitality technology stack, operators are under increasing pressure to move beyond disconnected systems and manual processes. Trybe brings intelligence to one of the most complex and underserved areas of hospitality such as spa, wellness, and leisure.

Trybe is a modern, API-first platform that uses data and AI-driven insights to optimize pricing, inventory, staffing, and guest journeys. By centralizing data across systems, operators can shift from reactive decision-making to proactive, performance-led strategies.

A key differentiator is Trybe's ecosystem of AI integrations, including Allora AI and Polly AI. These partnerships enable advanced forecasting, demand intelligence, and automated guest communication, allowing operators to leverage best-in-class AI without adding complexity.

At its core, Trybe applies intelligent yield management to non-room inventory, maximizing revenue per treatment hour and improving utilization. Combined with seamless integrations across PMS and CRM systems, Trybe delivers a unified guest view and more personalized, connected experiences.

As hospitality moves toward AI-powered operations, Trybe positions spa, wellness, and leisure as strategic drivers of revenue, experience, and long-term growth.

www.try.be

PRICING

Other

USER BASE

Over 400 properties in 45+ countries

AVAILABILITY

Global

PRODUCT TYPE

AI-Embedded

AUTONOMY LEVEL

Assistive

AI CAPABILITY TYPE

Conversational AI | Optimization | Forecasting | Speech / Voice

CONNECTIVITY

Connects with MEWS, Opera, Infor, Guestline, Maestro, Protel, RMS, Cloudbeds, PollyAI, AlloraAI. Revinate, Gantner, and so many more.

COMPANY

TRYBE — London, United Kingdom
try.be

FUNDING STAGE

Venture Growth

Sal Capizzi
sal@try.be
www.linkedin.com/in/sal-capizzi

Addendum

AI Glossary

A

A2A
A framework that allows AI agents to communicate, collaborate, negotiate, and exchange information directly with one another.

ACP
An open protocol designed to enable communication, coordination, and task delegation between AI agents operating across different systems, platforms, or organisations. ACP provides a standardised framework for agents to exchange instructions, context, capabilities, and results while maintaining interoperability and governance.

Adversarial Testing
Testing AI with difficult, malicious, or edge-case inputs. Example: a guest attempts to trick a chatbot into providing unauthorised discounts, confidential information, or policy exceptions.

AEO
The practice of optimising content for visibility within AI-generated answers.

Agent
An AI system capable of autonomously completing tasks, making decisions, and interacting with software, data, or users.

Agent Memory
Stored context that allows an AI agent to remember preferences, previous actions, or operational patterns. Useful, but sensitive from a privacy and governance perspective.

Agent Skill
A modular capability added to an AI agent, such as accessing files, sending emails, browsing the web, querying databases, or interacting with external systems.

Agent Swarm
A group of AI agents collaborating toward a shared objective while performing specialised tasks.

Agent-to-Agent Commerce
A commercial model in which AI agents negotiate and transact on behalf of users or businesses.

Agent-to-Agent Distribution
A future distribution model in which travel planning, shopping, booking, and post-booking interactions increasingly occur between autonomous agents rather than between humans and websites.

Agentic AI
AI designed to plan, reason, and act toward goals with minimal human intervention.

Agentic Ranking
The criteria and algorithms that determine how autonomous AI agents evaluate, filter, and position hotel offers when presenting recommendations to users.

Agentic Revenue Management
The application of autonomous AI agents to continuously analyse data, make pricing and inventory decisions, execute revenue strategies, and optimise commercial performance with minimal human intervention.

AI Agent Marketplace
A digital marketplace where AI agents can discover, purchase, exchange, or access services, skills, data, and capabilities from other AI agents.

AI as UI
The idea that conversational AI becomes the primary interface through which users interact with software, information, and digital services. Rather than navigating menus, forms, dashboards, or websites, users communicate through natural language, with AI acting as the intermediary layer between human intent and system execution.
— Concept introduced by Simone Puorto

AI Assistant
An AI-powered conversational system that supports users through natural language interactions.

AI Concierge
An AI assistant that provides recommendations, answers questions, and facilitates guest services.

AI Governance
The policies, controls, and principles governing the responsible use of AI.

AI Guardrails
Boundaries and controls that prevent AI from exposing guest data, making unauthorised promises, changing rates without approval, sending unapproved communications, or generating unsafe recommendations.

AI Hallucination
A confident but incorrect answer generated by AI.

AI Icing
The superficial application of AI tools across a legacy technology environment that lacks the foundational data structures or integration necessary to support meaningful outcomes.

AI Literacy
A basic understanding of what AI can do, what it cannot do, and how to use it responsibly. A concept strongly promoted by Ian Millar.
— Concept introduced by Ian Millar

AI Meeting Summary
AI-generated meeting minutes including key decisions, action items, owners, and deadlines from operational or corporate meetings.

AI Orchestration
The coordination of multiple AI models, agents, systems, tools, and workflows toward a common objective.

AI Overviews
AI-generated summaries displayed directly within search results.

AI Policy
A formal document defining how employees may and may not use AI within an organisation.

AI Readiness Assessment
An evaluation of whether a hotel possesses the data, systems, governance, skills, workflows, and leadership support required for successful AI adoption.

AI Roadmap
A step-by-step plan outlining AI adoption priorities, timelines, and implementation phases across departments.

AI ROI
The measurable return generated by AI adoption, including time savings, revenue growth, cost reduction, improved guest satisfaction, reduced risk, or increased productivity.

AI Search
The modern paradigm of search functionality, where users receive synthesised, conversational responses that invite ongoing dialogue, replacing the static list of links provided by traditional search engines.

AI Vendor Lock-in
Dependence on a single AI vendor's models, infrastructure, integrations, data structures, or agent ecosystem.

AI-Native Hospitality Systems
Hospitality systems designed with embedded AI capabilities from inception, rather than having AI features added later.

AI-Ready Data
Clean, structured, current, accurate, and trusted data that AI systems can effectively use.

Algomorphic Society
Concept introduced by Edmondo Grassi, describing a social system in which agency, decision-making, and subjectivity emerge from the continuous interaction of humans, algorithms, animals, technical objects, and environmental entities, forming a distributed, co-evolutionary technoecology rather than a human-centered hierarchy.
— Concept introduced by Edmondo Grassi

Anthropocentric Hospitality Framework
One of the three hospitality models within the Hospitality Evolution Framework. In the Anthropocentric model, human employees remain the primary source of value creation and service delivery. Human interaction, empathy, judgement, and presence are positioned as premium features, and guests may be willing to pay more for a predominantly human experience.
— Concept introduced by Simone Puorto

AP2
A protocol designed to facilitate financial transactions between autonomous AI agents. AP2 enables agents to negotiate, authorise, and execute payments on behalf of users or organisations, supporting emerging models of agentic commerce where software agents can independently purchase services, settle transactions, and manage economic interactions.

B

Batch Data
Data updated periodically rather than continuously in real time. Less suitable for time-sensitive operational decisions.

Bias
Systematic distortion in data or AI outputs.

Black Box
An AI system whose reasoning is difficult to explain.

Bot-First Content
Digital content structured and optimised primarily for consumption, interpretation, and processing by autonomous AI agents rather than human readers.

Brand Voice Control
The process of ensuring AI-generated communications reflect the hotel's approved tone, style, and brand personality rather than sounding generic or machine-generated.

Business AI
Enterprise-grade, industry-specific AI tools or native AI capabilities embedded within business applications. Unlike Consumer AI, the adoption, deployment, and configuration of Business AI are entirely within the control of the business or hospitality operator.

C

Chatbot
Software that interacts through text or voice conversations.

ChatGPT
A conversational AI application developed by OpenAI that brought generative AI into mainstream public awareness. Commonly, the first AI tool hotel employees encounter independently, making it a frequent entry point for Shadow AI (see).

Chunking
The process of breaking down large datasets or documents into smaller, semantically coherent segments to optimise data retrieval in AI systems like RAG.

Claude
A conversational AI assistant developed by Anthropic. Known for handling long documents and complex instructions. Used in hospitality for analysing contracts, drafting SOPs, summarising guest feedback, and powering AI agents. Many hotel-facing tools may be built on Claude without the hotelier being aware of it.

Claude Code
An AI-powered coding tool developed by Anthropic that allows users to build, edit, and debug software through natural language instructions. Relevant to hospitality operators building internal tools or automations without large engineering teams.

Closed AI Environment
An enterprise AI environment configured to protect organisational data and prevent it from being used to train public AI models.

CMP
A platform used to collect, manage, and document user consent.

Confidence Score
A metric indicating the level of certainty an AI model has in its generated response or decision, often used to mitigate the risk of hallucinations.

Connector
A bridge between AI systems and data sources or operational platforms, such as PMS, POS, RMS, BMS, CRM, or document repositories.

Consumer AI
Publicly available, mainstream AI tools adopted independently by the general public. In a hospitality context, this refers to the technology the guest chooses to use, entirely outside the hotel's or brand's control or influence.

Context Window
The amount of information an AI model can consider at one time. Determines how much content, such as contracts, SOPs, guest histories, incident reports, or revenue packs, can be analysed in a single interaction.

Conversational Reporting
Users interact with analytics through natural language rather than dashboards.

Copilot
An AI assistant working alongside a human user.

Cost-of-Acquisition Intelligence
AI analysis of the true cost of a booking, including commissions, transaction fees, loyalty costs, marketing spend, and distribution expenses.

CUPS
A framework for managing hotel data in the age of AI and agentic commerce. CUPS outlines four essential steps to make hospitality data discoverable, trustworthy, and actionable for both humans and machines: consolidating data into a single source of truth, keeping it up to date, processing it into machine-readable formats, and sharing it across distribution channels and AI agents.
— Concept introduced by Daniel C. Doppler

Cursor
An AI-powered code editor closely associated with the Vibe Coding movement. Increasingly used by hospitality operators to build lightweight internal tools, automations, and data workflows without relying on dedicated engineering resources.

D

Data Governance
The policies, processes, and controls that ensure data is accurate, secure, compliant, and properly managed so it can be trusted for business operations, analytics, and AI.

Data Lake
A centralised repository for large volumes of data.

Data Silos
Information trapped within separate systems such as PMS, POS, RMS, CRM, GRMS, BMS, reputation platforms, HR systems, or finance tools.

Deep Learning
A machine learning technique based on neural networks.

Deep Research
An AI capability that autonomously performs multi-step research, gathering, analysing, synthesising, and validating information from multiple sources to produce comprehensive outputs.

Demand Forecasting AI
AI that predicts future demand using booking pace, market conditions, events, competitor activity, weather, flight schedules, search behaviour, and historical trends.

Digital Labour
Work performed by AI systems, agents, or robots that substitutes or augments human labour.

Direct Booking as an Execution Interface
A paradigm shift where the direct booking engine serves primarily as an API or execution environment for AI agents to negotiate and finalise transactions autonomously.

E

Edge AI
AI running directly on local devices.

Embeddings
Numerical representations of text, images, or other data that capture their meaning, allowing AI systems to compare, search, and retrieve information based on semantic similarity rather than exact keywords.

Enterprise Search
The ability to search across an organisation's internal documents, systems, and knowledge repositories using AI.

Escalation Logic
Rules defining when AI must transfer a conversation or task to a human. Examples include angry guests, VIP complaints, refund disputes, legal threats, safety incidents, medical concerns, harassment reports, or payment disputes.

Ethical Traveller
A traveller who considers the ethical, social, environmental, and technological implications of their decisions and behaviours throughout the travel journey.
— Concept introduced by Jonathan MacDonald

EU AI Act
The European Union's regulation governing the development, deployment, and use of AI systems, establishing obligations based on the level of risk posed by each application.

F

Fine-Tuning
Adapting a foundation model for a specific task or industry.

Frontier Model
Frontier models are the most advanced AI models available at a given point in time, defining the current leading edge of what artificial intelligence can do.

Function Calling
A structured method allowing AI systems to trigger predefined actions or workflows, such as creating maintenance tickets, retrieving policies, or summarizing arrivals.

G

Gemini
A family of AI models developed by Google, integrated across Gmail, Google Docs, Google Search, and Google Cloud. Relevant to hoteliers because it powers AI features within tools that many properties already use.

Generative AI
AI capable of creating text, images, audio, video, or code.

GEO
The practice of optimising content to increase visibility within AI-generated responses. See AEO.

GitHub Copilot
An AI coding assistant developed by GitHub that helps developers write code faster. Commonly used by the technology vendors and integration partners building hotel systems.

Gothic Flatline
Concept introduced by Mark Fisher. A liminal condition in which the distinction between human and machine, animate and inanimate, becomes increasingly blurred. It serves as a metaphor for the technological transition currently reshaping hospitality.

GPT
The family of AI models developed by OpenAI that powers ChatGPT and many third-party applications. Many hotel-facing AI tools and chatbots are built on GPT models, sometimes without this being explicitly stated by the vendor.

Guest Churn Prediction
AI identification of guests who may not return due to dissatisfaction, reduced engagement, price sensitivity, poor service recovery, or changing behaviours.

Guest Digital Twin
A digital representation of a guest's preferences, behaviours, and history.

H

Hard AI
Robotics-based artificial intelligence that integrates cognitive software with physical hardware, enabling machines to perceive, navigate, and interact with the physical world.
— Concept introduced by Mark Fancourt

Headless CMS
A content management system that separates content storage from presentation.

High-Risk Use Case
An AI application involving sensitive decisions, guest data, pricing, employment, health, safety, legal exposure, or brand reputation. Requires stronger controls and human approval.

Hospitality Evolution Framework
A framework describing the evolution of hospitality through three operating models: Anthropocentric, Hybrid, and Technocentric, based on the relative contribution of human and digital workers to value creation and service delivery.
— Concept introduced by Simone Puorto

Hotelier's Oath
A proposed ethical framework for hospitality professionals, inspired by the Hippocratic Oath in medicine. It represents a commitment to preserving the sacredness of human-to-human relationships and to ensuring that technology enhances rather than replaces genuine hospitality.
— Concept introduced by Simone Puorto

HumAIn Framework
A state of auto-automation guided by human oversight, where human captains provide direction based on system feedback and contextual nuance. The goal is to maximise human-centred hospitality, strategically enhanced and given a competitive advantage through intelligent technology.
— Concept introduced by Mark Fancourt

Human Override
The ability for employees to stop, modify, reject, or correct an AI-generated action or recommendation. Essential when guest experience, safety, finances, or reputation are involved.

Human Sustainability
A strategic approach that measures technological success not only through efficiency gains but also through improvements in employee well-being, resilience, and quality of work.
— Concept introduced by Davide Bernasconi

Human Value Stack
The collection of human capabilities that become more valuable as AI adoption increases, including empathy, judgment, creativity, ethics, leadership, cultural awareness, and relationship-building.

Human-in-the-Loop
Humans actively review or approve AI outputs.

Human-on-the-Loop
Humans supervise AI systems and intervene when necessary.

Human-out-of-the-Loop
AI operates without direct human supervision.

Humans-as-Luxury
The theory that, as automation and artificial intelligence become increasingly ubiquitous, authentic human interaction, craftsmanship, empathy, judgement, presence, and even imperfection become scarcer and therefore more valuable, eventually evolving into a premium form of luxury. Original paper: "Humans-as-Luxury: The Future of Hospitality in an AI-Driven Age," available at https://humansasluxury.com.
— Concept introduced by Simone Puorto

HXO
The strategic coordination of technology, employees, data, timing, service design, and human touchpoints to ensure guests feel recognised rather than processed.
— Concept introduced by Terence Ronson

Hybrid Hospitality Framework
One of the three hospitality models within the Hospitality Evolution Framework. In the Hybrid model, value creation is shared between human employees and intelligent systems. AI, automation, and robotics handle routine and transactional tasks, while humans focus on empathy, creativity, problem-solving, and guest experience. The model seeks to balance operational efficiency with meaningful human interaction and is likely to become the predominant operating model for most hotels in the foreseeable future.
— Concept introduced by Simone Puorto

Hyperautomation
The combination of AI, automation, and process optimisation technologies.

I

IDE
A software application that provides developers with the tools needed to write, test, and debug code in one place. AI-powered IDEs such as Cursor, Windsurf, and GitHub Copilot now incorporate generative AI to assist with coding through natural language, lowering the barrier for non-traditional developers to build operational tools.

Intent Envelope
A structured package of a traveler's needs, preferences, constraints, and trip goals, assembled by a personal AI agent or chatbot. It functions like a "mini-RFP" that can be shared with a hotel, travel seller, or seller-side agent to help them generate more relevant, customized offers. Where no seller-side agent exists, the traveler's agent may use the intent envelope to call the seller's available tools or MCP server directly.
— Concept introduced by George Roukas

Invisible Shortlist
The small group of options selected by AI systems before a traveller ever sees a list of results. Properties that fail to enter this shortlist become effectively invisible, regardless of their traditional search rankings.
— Concept introduced by Kurt Weinsheimer

Ivanov Labour Shortage Framework
A framework describing three strategic responses to labour shortages: Import People (addressing labour shortages through immigration, international recruitment, or workforce mobility. Typically a short- to medium-term solution, but often associated with high social and political resistance); Substitute People (replacing human labour with automation, robotics, artificial intelligence, and self-service technologies. Generally, the most scalable response to labour shortages and often faces lower political resistance than large-scale immigration); Produce People (expanding the labour force through demographic growth, education, training, and workforce development policies. Usually, a long-term solution requiring substantial time before results become visible).
— Concept introduced by Stanislav Ivanov

J

Jailbreak
An attempt to bypass AI safety restrictions.

K

Knowledge Graph
A structured network of entities and relationships.

Knowledge Retrieval
The process of locating and retrieving relevant information from databases, documents, or knowledge bases for use by AI systems.

L

Lacanian Hospitality
The theory that hospitality temporarily recreates the illusion that the world revolves around the guest. Drawing on Jacques Lacan's concept of the stade du miroir (mirror stage), the framework suggests that exceptional hospitality restores a fleeting sense of centrality, recognition, and importance, making guests feel as though their desires, needs, and presence occupy the centre of the experience. In this view, hospitality functions as a carefully orchestrated mirror that reflects the guest's idealised sense of self.
— Concept introduced by Simone Puorto

Large Language Model
A type of AI model trained on vast amounts of text.

Latency
The time elapsed between a user submitting an input and an AI system returning a response. For back-office tasks such as summarising reports or drafting communications, latency is rarely critical. For guest-facing applications like chatbots, voice agents and in-room assistants, it is a functional requirement: delays of more than one to two seconds create friction and undermine the guest experience. When evaluating AI vendors for real-time deployments, latency should be tested under realistic load conditions, not just controlled demos.

Llama
An open weights large language model developed by Meta. Unlike closed models, Llama can be deployed within a private or on-premise environment, making it relevant to hoteliers concerned about data privacy or vendor lock-in.

LLM Citation
A reference or source provided by an AI system to support its answer.

LLMO
The practice of optimising content, structure, and data so that AI models can more effectively discover, understand, and reference information.

Local Agent
An AI agent operating on a local device or within a private environment rather than entirely in the public cloud. Often preferred by privacy-sensitive organisations.

Long-Term Memory
Context retained across multiple sessions. Requires clear privacy rules, retention policies, consent mechanisms, and deletion procedures.

Low-Risk Use Case
An AI task with limited guest, legal, financial, or operational risk. Examples include summarising documents, drafting training materials, creating meeting agendas, or preparing internal briefing notes.

M

Machine Learning
AI systems that learn patterns from data.

MCP
An open standard that allows AI models to securely connect to external systems, tools, databases, and applications.

Memory After the Stay
The collection of memories, data, preferences, and digital traces that continue to exist after the physical guest journey has ended.
— Concept introduced by Edmondo Grassi

Microsoft Copilot
Microsoft's AI assistant integrated across Outlook, Word, Excel, PowerPoint, and Teams. Particularly relevant to hotel corporate offices already operating within the Microsoft ecosystem.

Model Switching
The ability to route tasks between different AI models based on performance requirements, privacy considerations, cost, or use case.

Multi-Agent System
An environment in which multiple AI agents collaborate while performing specialised roles. Examples include Revenue Agents, Marketing Agents, Finance Agents, and General Manager Agents working together.

Multimodal AI
AI capable of understanding text, images, audio, and video together.

N

NoHo
The dilution or elimination of human-delivered service within the guest journey, resulting from a technology strategy that shifts operational tasks entirely onto the customer. Characterised by an over-reliance on self-service automation (e.g., mandatory kiosks, rigid chatbots, app-only interactions), where efficiency gains for the operator come at the expense of authentic hospitality and personalised human connection.
— Concept introduced by Mark Fancourt

NotebookLM
An AI-powered research tool developed by Google that allows users to upload documents and interact with them through natural language. Useful in hospitality for summarising contracts, analysing reports, or building internal knowledge bases that staff can query conversationally.

O

Open Source AI
AI systems whose code, model weights, or both are publicly available, allowing users to inspect, modify, deploy, and build upon the technology.

OpenAI
The American AI research company behind the GPT model family and ChatGPT. A significant proportion of the AI tools and chatbots available in the hospitality market are built on OpenAI's models and infrastructure.

P

Perplexity
An AI-powered search engine that provides direct, cited answers rather than a list of links. Relevant to hoteliers monitoring how potential guests discover and evaluate properties, as platforms like Perplexity can influence travel research without directing users to hotel websites.

Physical AI
Artificial intelligence embedded in robots and machines that can sense, navigate, and interact with the physical world. Example: Service robots for delivery, cleaning, and operational support in hospitality environments.

Predictive Analytics
Using data and AI to forecast future outcomes.

Predictive Conversational Reporting
AI proactively identifies anomalies, opportunities, risks, and emerging trends.

Predictive Maintenance
AI-assisted forecasting of equipment failures before breakdowns occur. Common applications include HVAC systems, elevators, pumps, chillers, boilers, laundry equipment, kitchen equipment, guestrooms, and building infrastructure.

Private Knowledge Base
A secure collection of organisation-specific information that AI can search, including SOPs, brand standards, menus, room information, policies, emergency procedures, FAQs, and training materials.

Prompt
An instruction given to an AI system.

Prompt Engineering
The practice of designing prompts to improve AI performance.

Prompt Library
A curated collection of approved prompts designed for specific hotel departments, workflows, or roles.

Proof of AI
An alternative solution to common consensus mechanisms, driving efficiency by removing human interference and establishing the objective of the AI to fulfil its task in the most useful way.
— Concept introduced by Jonathan MacDonald

Public AI Tool
A publicly available AI application intended for general users. Useful, but potentially risky if confidential hotel, guest, employee, or ownership information is entered.

R

RAG
An AI architecture combining language models with external knowledge sources.

Read-Only Mode
An AI configuration that can retrieve, analyse, or summarise information but cannot make changes. Often, the safest starting point for AI adoption.

Real-Time Data
Current operational information, such as room status, guest requests, occupancy levels, rate changes, work orders, payments, or maintenance alerts.

Reasoning Model
An AI model optimised for complex problem-solving.

Replit
A browser-based coding environment with integrated AI capabilities. Associated with the Vibe Coding movement, allowing hospitality operators to build and deploy lightweight tools without dedicated engineering support.

Revenue Optimisation
The use of AI, analytics, forecasting, and pricing strategies to maximise revenue, profitability, and commercial performance across hospitality operations.

Reverse Prompting
AI technique that reverses the traditional prompting process to improve output quality. Instead of attempting to write the perfect prompt from the start, the user begins with the desired outcome and works backward, or allows the AI to ask clarifying questions in order to define goals, constraints, and requirements before generating a response.

Reverse Uncanny Valley
The inversion of Masahiro Mori's Uncanny Valley theory. Rather than artificial systems becoming unsettling because they appear almost human, the Reverse Uncanny Valley (also known as the Olympia Effect) describes the phenomenon whereby humans become so optimised, scripted, emotionally regulated, and system-dependent that they themselves begin to appear artificial and uncanny. In hospitality, it refers to the progressive transformation of employees into highly standardised service performers whose behaviours, language, emotions, and interactions increasingly resemble those of machines.
— Concept introduced by Simone Puorto

Review Response AI
AI that drafts responses to online reviews. Outputs should be reviewed by humans to avoid generic, inaccurate, legally risky, or tone-deaf responses.

RPA
Technology that automates repetitive, rule-based digital tasks.

S

Sandboxing
Executing AI actions within a restricted environment to reduce operational, security, and compliance risks.

Schema
A standardised vocabulary of structured data added to the website code that helps search engines, AI agents, and bots accurately understand, categorise, and extract specific content.

SELF
Sovereign, Ethical, Lifestyle Filtering. An acronym created by Jonathan MacDonald.
— Concept introduced by Jonathan MacDonald

Semantic Layer
A business-friendly data layer that defines the meaning of key hotel metrics and concepts across systems, helping AI understand terms such as room revenue, net ADR, occupied room, guest complaint, or available inventory.

Semantic Offer Control
A hotel's strategic ability to manage and influence how AI models interpret its brand, value proposition, and offerings compared to third-party distribution channels.

Semantic Search
Search based on meaning rather than keywords.

Shadow AI
The use of AI tools by employees without approval, governance, security review, or management visibility.

Short-Term Memory
Context retained during a single task or session. Generally safer for sensitive hospitality operations.

Single Source of Truth
The officially approved location where correct and current information resides. AI systems should reference this source rather than outdated documents or disconnected files.

Small Language Model
A compact AI language model designed to operate with lower computational requirements, often enabling faster, cheaper, and more private deployments than large language models.

Soft AI
Software-based artificial intelligence applications that operate entirely within digital environments, focusing on data processing, language generation, analysis, and digital user interfaces.
— Concept introduced by Mark Fancourt

Supervisor Agent
An AI or software layer responsible for coordinating other agents and validating their outputs.

Swappability
The ability to replace, upgrade, or change AI components within an ecosystem without disrupting operational continuity.
— Concept introduced by Stephan Wiesener

Synthetic Data
Artificially generated data used for testing, simulation, or model training without exposing real guest information.

Synthetic Gaze
The ability of AI-generated visual content to simulate human perception and attention, influencing how audiences interpret authenticity, trustworthiness, and reality.
— Concept introduced by Kristian Lupinski

Synthetic Persuasion
The use of artificial intelligence to generate, personalise, and optimise persuasive messages in real time based on individual preferences, behaviours, and contextual signals.
— Concept introduced by Neil Foster

T

TCPG
The average generative AI cost incurred per guest. TCPG is calculated by dividing the total cost of AI tokens consumed across all guest-facing and operational interactions by the total number of guests served.

Technocentric Hospitality Framework
One of the three hospitality models within the Hospitality Evolution Framework. In the Technocentric model, AI, automation, robotics, and autonomous systems become the primary source of value creation and service delivery. Human involvement is minimised and reserved for exceptional situations, while guests increasingly interact with digital systems and self-service technologies. In this model, hospitality becomes increasingly defined by system performance rather than human interaction.
— Concept introduced by Simone Puorto

Token
The basic unit processed by a language model.

Tokenmaxxing
The practice of excessively increasing AI usage, context length, agent complexity, prompt size, or workflow automation in pursuit of marginal performance gains, often resulting in disproportionate token consumption, rising costs, increased system complexity, and diminishing operational returns.

Total Cost of Ownership
The full cost of AI adoption, including licenses, integrations, data preparation, training, governance, support, vendor fees, and change management.

Training Data
Information used to train or improve an AI system. In hospitality, this may include SOPs, guest interactions, service logs, reviews, maintenance records, call transcripts, menus, or booking data.

Transformer
The architecture powering most modern AI models.

Travel Singularity
A future state in which artificial intelligence, robotics, autonomous systems, and algorithmic decision-making become so deeply embedded throughout the travel ecosystem that most operational, commercial, and experiential processes occur with minimal human intervention, creating a point beyond which travel can no longer be meaningfully understood or operated through exclusively human decision-making.
— Concept introduced by Simone Puorto

True Recognition
The ability to recognise and understand guests as unique individuals rather than as collections of transactional or behavioural data points.
— Concept introduced by Alan Young

U

UCP
An open standard developed by Google designed to enable agentic commerce across AI surfaces such as Google Search's AI Mode and Gemini. UCP allows merchants, including hotels, to integrate checkout logic directly with Google's AI systems, enabling autonomous agents to complete bookings and transactions on behalf of users. Notably expanding into the lodging sector, UCP represents a significant shift in how hotels may need to think about distribution, as transactions increasingly bypass traditional booking interfaces entirely. Hotels that adopt UCP retain their customer data and remain the Merchant of Record.

Unstructured Data
Information such as emails, reviews, images, videos, and documents.

V

Vector Database
A database optimised for storing and searching embeddings.

Vibe Coding
A software development approach in which developers describe outcomes in natural language, and AI generates much of the code.

Virtual Agent
An AI-powered digital employee or assistant.

Voice Agent
An autonomous AI agent that interacts through spoken conversation and can perform actions on behalf of users.

Voice AI
AI systems that understand and generate spoken language.

Voice Commerce
The purchase of products or services through voice interactions.

W

WCAG
International standards defining how digital experiences should be made accessible.

WebMCP
An implementation of MCP designed for web-based systems and applications.

Windsurf
An AI-powered code editor developed by Codeium, similar in concept to Cursor. Part of the broader Vibe Coding movement, enabling non-traditional developers to build operational tools and automations.

Workflow Automation
The automation of repetitive business processes.

Write Access
A permission level allowing AI to create, edit, send, approve, publish, or modify records. High risk and typically subject to strong governance controls.

Z

Zero Trust AI
The application of zero-trust security principles to AI systems and agents, where no user, system, or action is automatically trusted, and every request must be verified.

Zero-Click Search
A search experience in which users receive answers directly without visiting external websites.

Zero-Shot Learning
The ability of an AI model to perform a task without prior task-specific training.