

# Hospitality Futures

Tomorrow's Vision

# Foreword

Hospitality is one of the world's most dynamic industries, shaped daily by the choices of guests, operators and partners. It is also one of the most complex. From managing properties and supply chains to creating memorable guest experiences, leaders must balance creativity with commercial focus, and innovation with reliability.

At Oracle NetSuite, we have the privilege of working alongside a diverse range of hospitality businesses. That vantage point gives us a close-up view of how the industry is evolving: where technology is helping operators gain agility, where new models are emerging and where opportunities to create lasting value are opening up.

This report, produced in partnership with The Future Collective, shares some of the strongest signals we see shaping hospitality's next chapter. Covering accommodation, food and beverage, and stadiums, it looks at how businesses are responding to shifting guest behaviours, what role data and automation are playing in driving smarter decisions and how operators can stay resilient while continuing to deliver authentic experiences.

Our aim is simple: to provide insight that helps leaders act with confidence in the face of change. We are proud to contribute to that conversation, and to support the hospitality community as it navigates complexity and seizes the exciting opportunities ahead.

**Kath Brameld**  
Hospitality Industry Director, Oracle NetSuite

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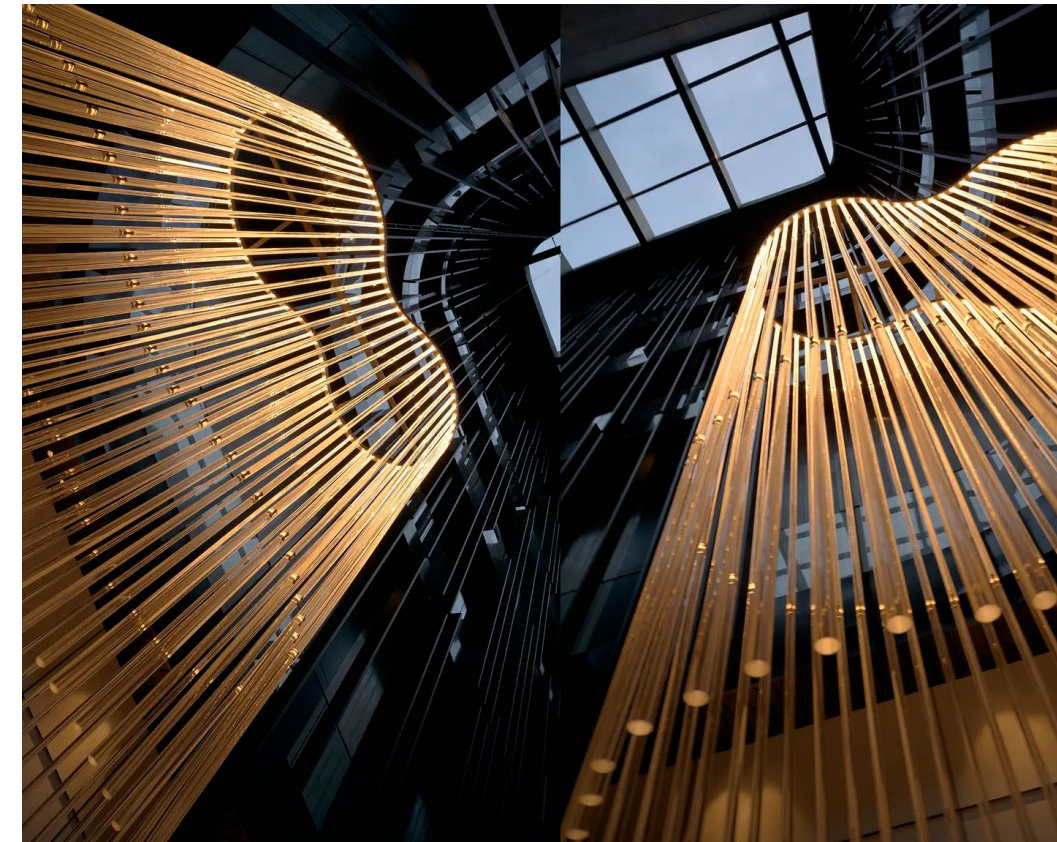
Image Source: Dosa at the Mandarin Oriental Mayfair, London

# Overview



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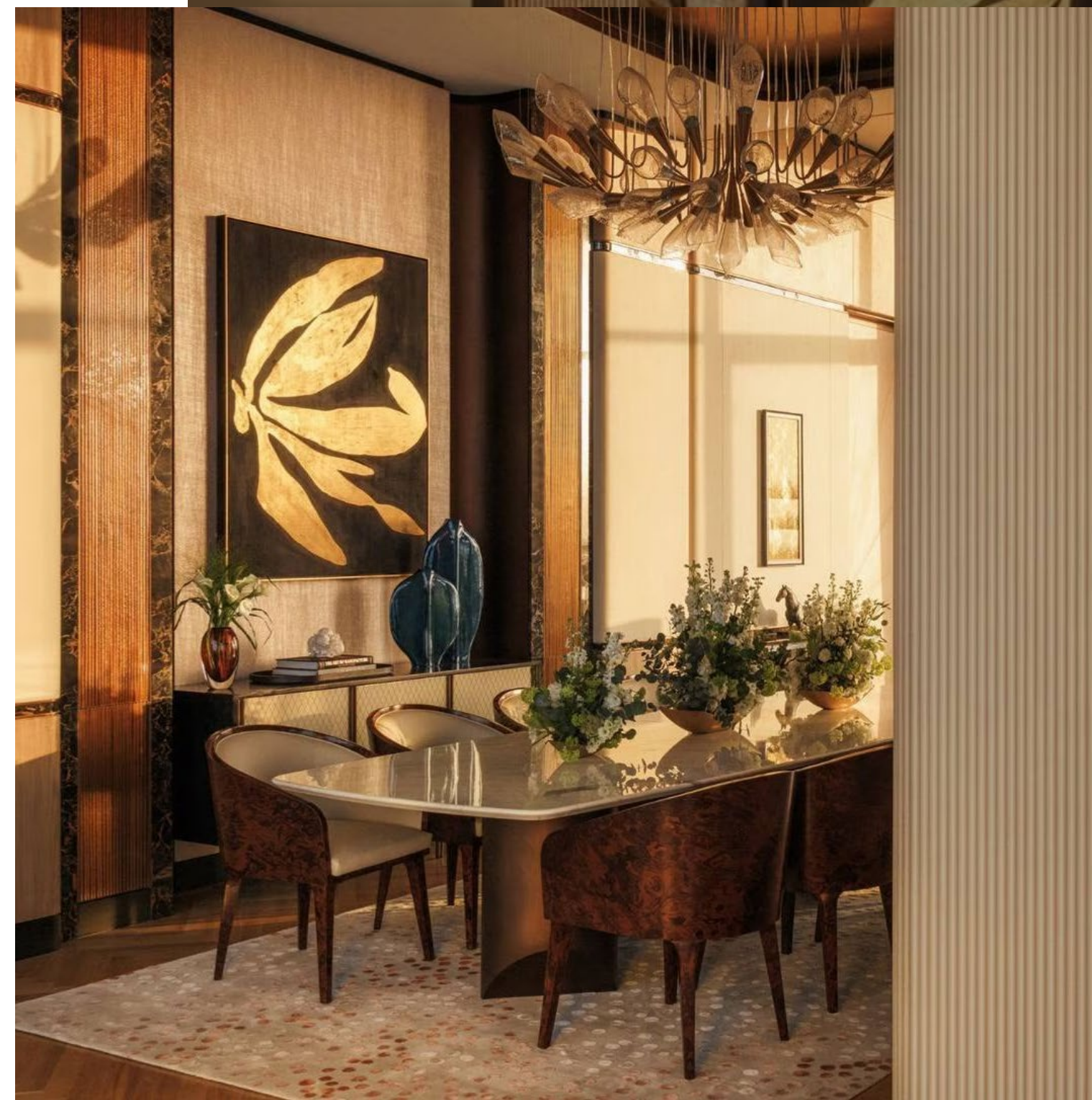
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# Introduction

Hospitality has never stood still, but the past few years have accelerated change beyond recognition. The pandemic disrupted old patterns, and the industry has evolved past business as usual. A new horizon is emerging, shaped by heightened expectations and the enduring human need for meaningful connection.

This is also an era of convergence. Hotels, restaurants and venues are no longer separate worlds, but part of a unified experience economy. The future lies in the overlaps, where audiences meet, formats blur and technology amplifies rather than replaces human touch.

In the years ahead, hospitality will be reimagined through intelligent systems, shifting lifestyles and the demand for experiences that feel both seamless and personal. This report charts that path forward, exploring what hospitality could become when operational excellence meets emotional resonance.



HOTEL  
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# The Forces Shaping Hospitality

The hospitality landscape is being shaped by the interplay of cultural, technological and environmental forces that are redefining venue operations and brand-guest relationships.

# Fluidity

“66% of travellers are more interested in travel now than before the COVID-19 pandemic. And millennials and Gen Zers are travelling more and spending a higher share of their income on travel than their older counterparts.”

McKinsey (2024) What Is the Future of Travel? 7 June.

## When nothing stands still.

The old rules of hospitality are fading. Traditional routines, from business trips to mealtimes, are giving way to lifestyles where work, leisure and home converge. Behaviour is faster and more diverse, with changing demographics and evolving mindsets creating greater breadth and depth in expectations. Hospitality must now stretch across moments, formats and audiences.

This fluidity is playing out at a global scale. According to the World Economic Forum and Kearney, the travel and tourism sector is projected to serve 30 billion tourist visits and contribute \$16 trillion to global GDP by 2034, accounting for more than 11% of the world's economy. Growth will be driven by new middle classes from India, Southeast Asia and Eastern Europe. Journeys are no longer confined to a single purpose or pattern; they stretch across cultures, age groups and occasions, from micro-trips to multi-generational adventures. Digital natives are

growing up globally connected, seeking to translate online curiosity into real-world exploration, while boomers are redefining later-life travel with adventure and adrenaline.

The blurring of boundaries is also reshaping daily life. Hybrid work has untethered people from fixed schedules, fuelling the rise of “third spaces” with cafés, hotels and venues that double as hubs for work, socialising and relaxation. Hospitality is increasingly expected to flow across the day, from early workouts and brunch meetings to late-night dining and live entertainment.

For operators, the challenge is to design for this fluidity, with dining that moves beyond dayparts, events that span from intimate gatherings to mega-scale productions, and hotels and venues that act as workplaces, social hubs and sanctuaries. Above all, hospitality must live at the pace of its guests, flexible to their demands, but anchored by its own sense of place and purpose.



“Consumers are craving immersive experiences with a conscience.”

Hilton Trends Report 2025: The Vacation Maximized

# Intentionality

## When purpose drives every choice.

Costs have risen sharply for guests in recent years, making every stay, meal or event an intentional act. Time and money are being spent with greater care, and hospitality must prove its value beyond the basics. Guests are scrutinising both the price and the principles behind their choices, seeking experiences with greater depth and meaning that feel authentic, responsible and enriching.

Overtourism has only sharpened this lens. McKinsey reports that 80% of travellers visit just 10% of the world’s tourist destinations, often overwhelming infrastructure, frustrating locals, and damaging attractions. In response, new behaviours are emerging, from swapping crowded hotspots for overlooked destinations, to favouring hotels that champion local

heritage or restaurants that evidence positive impact beyond the plate.

Guests now want experiences that resonate and endure. Sustainability has become a shared duty between operators and guests, with both playing a role in protecting communities and ecosystems. Intentionality shows up in regenerative practices, transparent communication, and design that connects people to place. Guests want to feel their choices contribute to communities, ecosystems, or their own sense of wellbeing.

For the next decade, hospitality leaders will be those who align guest desire for connection with tangible commitment to people and planet. Trust, transparency and purpose are the true foundations of loyalty.

# Ease

## When simplicity meets intelligence.

Convenience is no longer about speed alone. Guests now want journeys that feel frictionless yet personal, intelligent yet human. AI and automation power the systems beneath the surface, but it is empathy, creativity and care that bring hospitality to life. The future of ease lies in that balance, with technology amplifying human service, not replacing it.

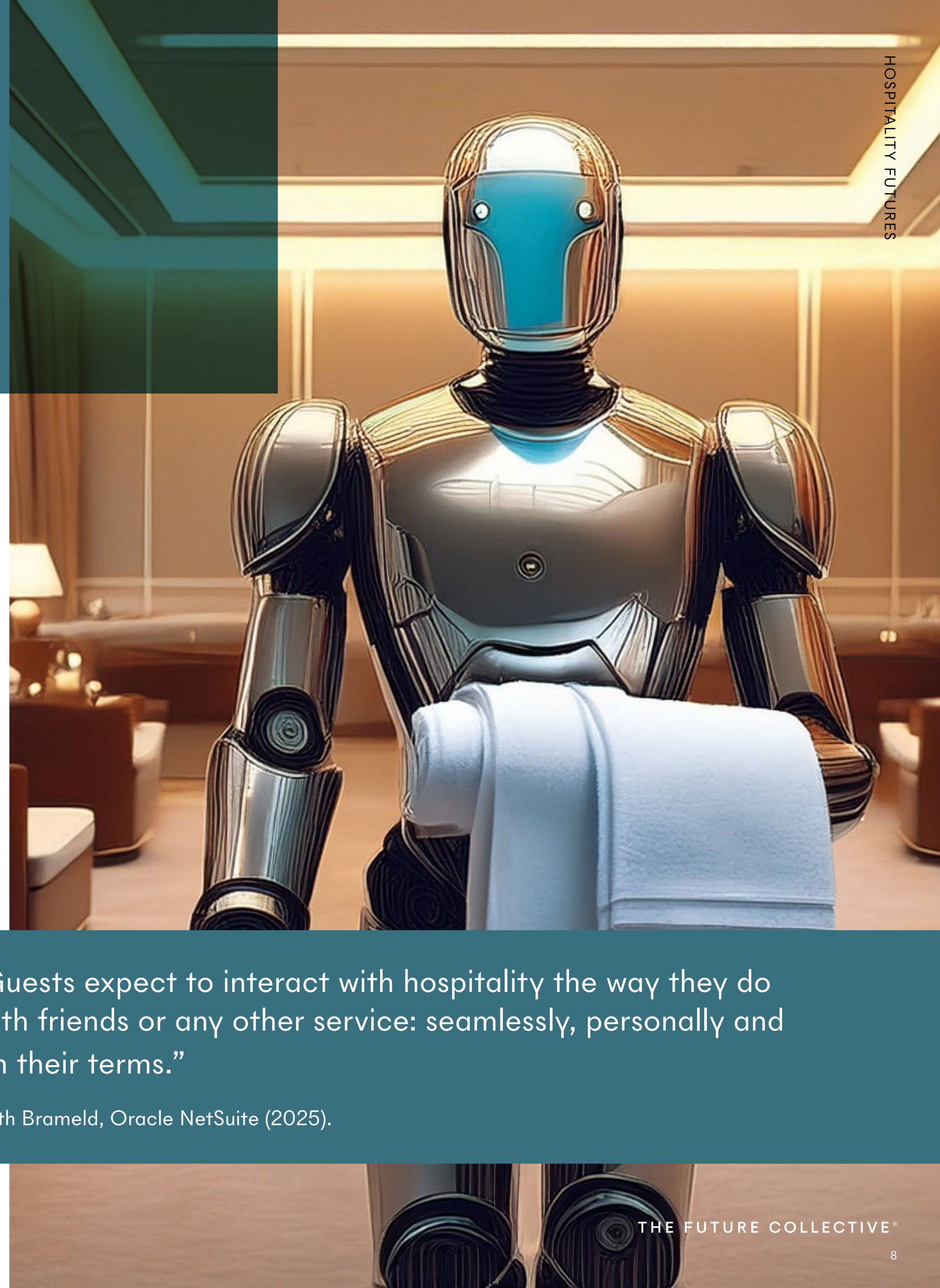
That balance looks different for every guest. Digital natives are comfortable with self-directed, tech-enabled journeys. Older guests may prefer the reassurance of face-to-face contact. Some expect high-touch service, while others prefer seamless self-service. True ease is about giving people freedom to choose and technology gives operators multiple chances to connect at just the right time.

For operators, the importance of ease is clear. Labour shortages make technology essential, but its value goes further. With AI investment in hospitality predicted to grow 60% annually to \$8 billion by 2033 (Hotel Management, 2025), the opportunity is to build operations that are not only more efficient, but more resilient, responsive and future-ready.

The redefinition of ease is about balance, crafting experiences that blend technical precision and human warmth, creating hospitality that feels seamless, personal and memorable.

“Guests expect to interact with hospitality the way they do with friends or any other service: seamlessly, personally and on their terms.”

Kath Brameld, Oracle NetSuite (2025).



# Distinctiveness

## When unique beats uniform.

As globalisation and automation risk flattening experiences, the value of originality rises. Guests are no longer satisfied with the generic. Expectations are moving towards stays and events that feel singular, rooted in local culture and community, yet still coherent within a brand promise.

Younger generations, in particular, are seeking difference. “They want their hotels to reflect the environment and the location in which they’re physically situated, as opposed to having a sense of sameness,” says Deloitte’s Vik Krishnan (2023). A 2025 Hilton survey echoes this demand: nearly 88% of hotel team members agreed guests are actively seeking unique experiences and adventures alongside reliability. As expectations shift, operators have the chance to respond with stronger, more distinctive identities.

For some, that means curated niche offerings; for others, diversified portfolios to meet specific needs. The common thread is a focus on experiences that stand out, not blend in.

Technology can amplify distinctiveness, helping operators create experiences that feel more local, personal and ownable. But used carelessly and without imagination, it does the opposite: creating what researchers call ‘AI-formisation’, where AI-driven systems lead to uniformity in experiences and creative content.

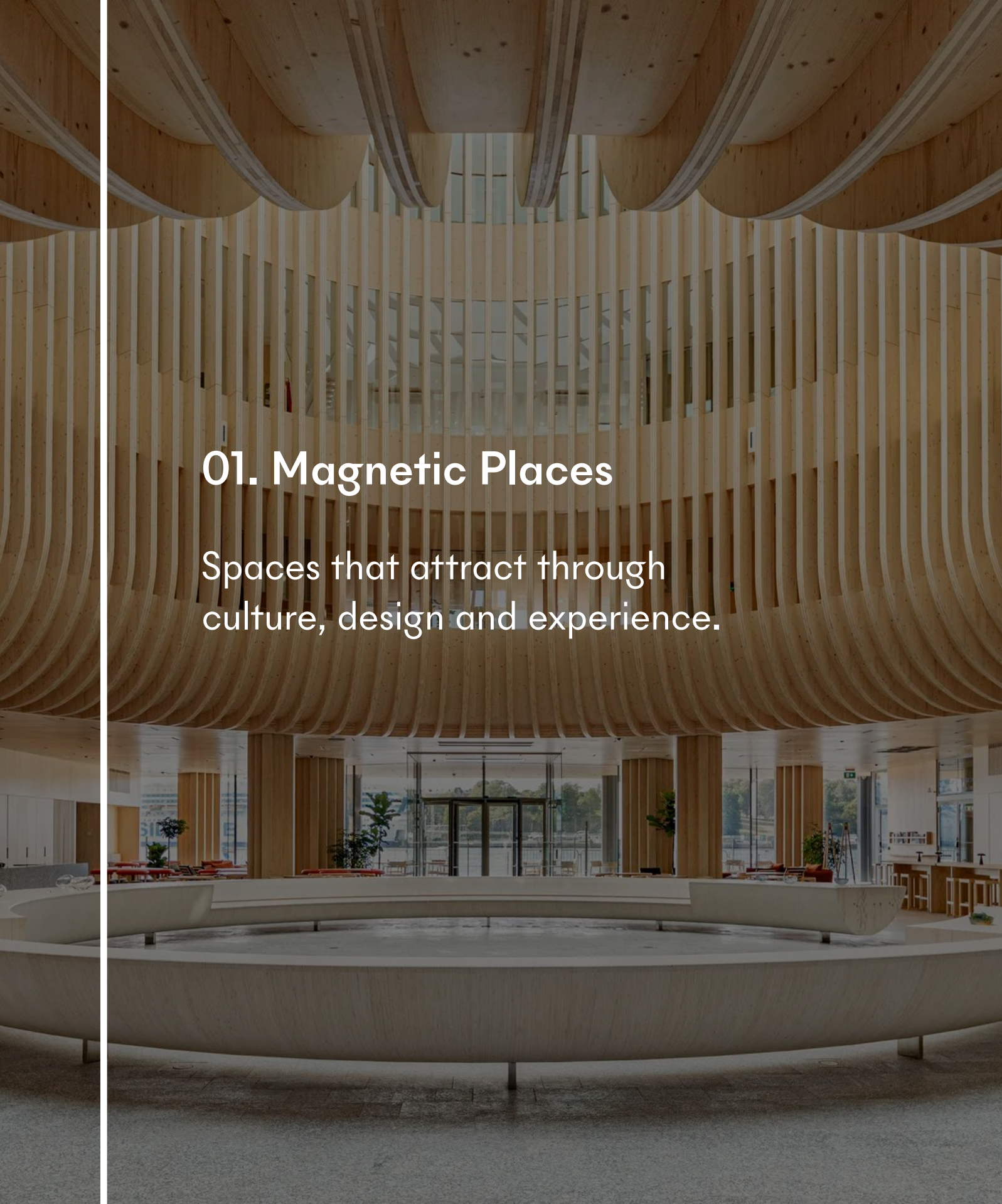
The bar is set higher than brand differentiation. In a world where AI can mimic and social media can blur, distinctiveness is rare. Experiences so deeply rooted in place and story that they cannot be replicated will define the sector’s new standard.

“The industry increasingly recognises that true luxury isn’t about uniformity but about creating the perfect setting for each chapter of our guests’ lives.”

Daniel Shamoon, Co-owner & Director of Luxury Hotel Partners (2025).

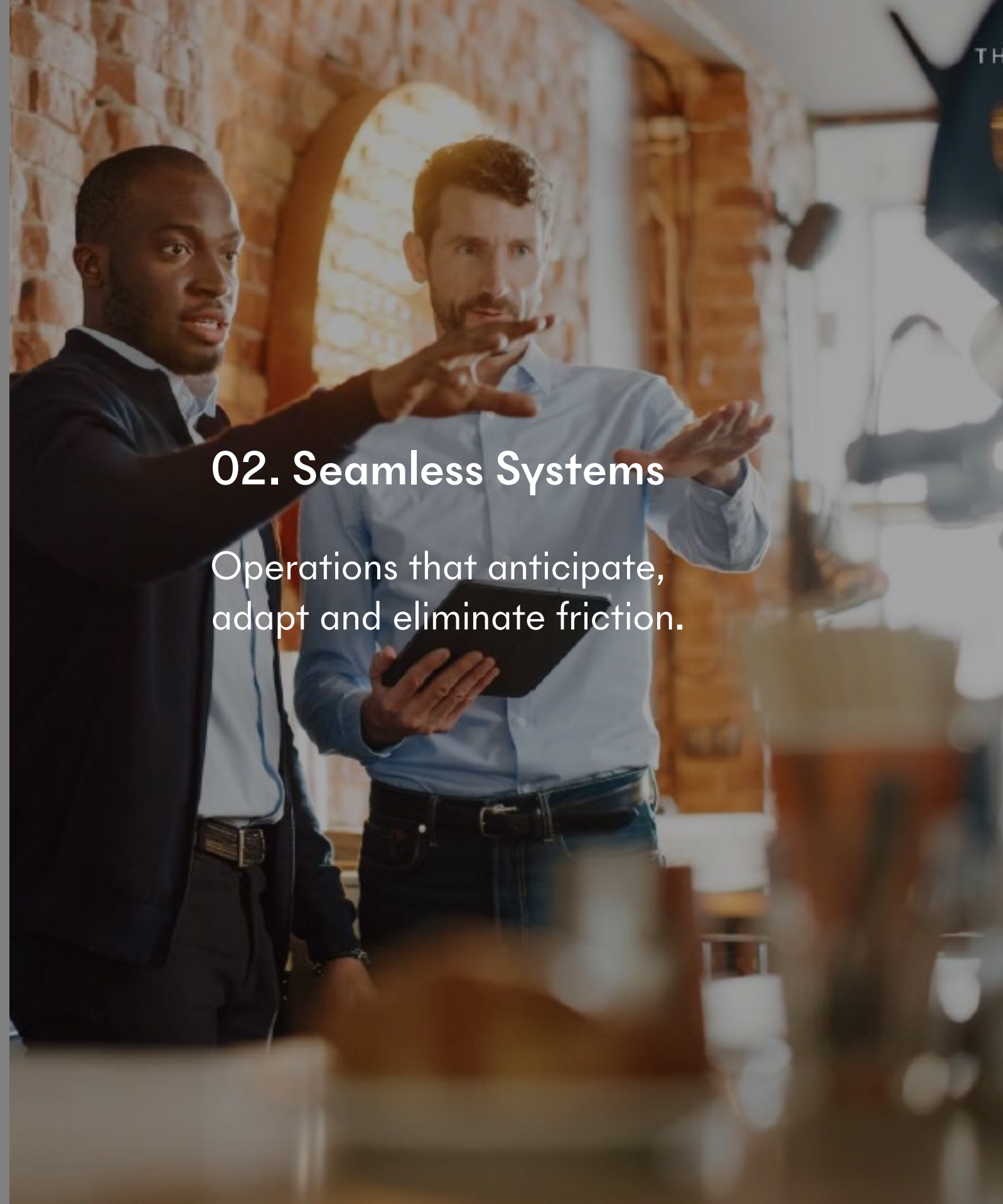
Image Source: Penicillin Bar, Shanghai

HOSPITALITY FUTURES



## 01. Magnetic Places

Spaces that attract through culture, design and experience.



## 02. Seamless Systems

Operations that anticipate, adapt and eliminate friction.



## 03. Vital Connections

Relationships that transform transactions into belonging.

# Hospitality Futures Equation

Three interconnected pillars are powering the future of hospitality.

# 01 Magnetic Places

- Culinary Anchors
- Cultural Hybrids
- Healthspan Havens
- Distributed Living
- Cool Capital

# Culinary Anchors

## What happens when food becomes the main attraction?

Food and beverage as anchor experiences in hotels, restaurants and event spaces.

### The Future Forecast

The food and beverage sector has become the anchor of the hospitality experience. Hotels are judged as much by their restaurants as their rooms, stadiums are reborn as dining destinations, and restaurants themselves are evolving into venues where the experience around the plate matters as much as what's on it. Immersive formats, chef residencies, cult-brand collaborations and hybrid delivery models are reshaping what F&B means in hospitality.

This is especially evident in hotels, with travellers booking with tables top of mind. Positive reviews about hotel restaurants, chefs and bars increased 40% year-on-year on Hotels.com, while nearly a third of travellers say access to a famous restaurant via room service would make them more likely to book (Expedia, 2025). Solo travellers want flexibility and choice, with two in five saying smaller portion sizes or personalised tasting menus would improve their experience (Hilton, 2025). In cities, viral restaurants have become cultural status symbols, with queues forming around the block for TikTok-famous hotspots.

The traditional boundaries of dining are dissolving. Dayparts are being reimaged with 24-hour formats that serve everything from late-night tasting menus to all-day grazing. High-low dining is also thriving, as luxury hotels embrace street-food pop-ups alongside Michelin-starred chefs, and cult fast-casual brands expand into fine dining settings.

Innovation is pushing food and beverage even further into the spotlight. Restaurants are experimenting with multisensory storytelling that merges taste, sound and visuals to create unforgettable experiences. Stadiums are transforming concessions into diverse culinary destinations, featuring everything from craft cocktails and regional specialties to premium lounges that rival the best city dining rooms. Even delivery is being reimaged, with dark kitchens and hybrid service models extending restaurant experiences beyond their walls.

Food is driving hospitality in new directions. As the plate takes centre stage, every venue has the opportunity to make dining its standout feature.

### Pioneers in Action

- The new Chancery Rosewood hotel puts F&B at the heart of its offer with Serra Mediterranean dining, Tobi Masa's first UK restaurant, a tea salon, rooftop listening bar, deli and New York icon Carbone.
- Rockfish at Jumeirah Al Naseem launched an Immersive Chef's Table in 2025, pairing Italian seafood with interactive performances, projections and soundscapes.
- Tottenham Hotspur Stadium sets a new benchmark for stadium F&B, from Europe's longest bar and street-food stalls to Michelin-level menus. In the £20,000-a-year Tunnel Club, members enjoy four-course meals, while multiple membership tiers, an in-house brewery and hospitality for 60,000+ fans show how food now defines the modern event experience.



Image Source: The Tunnel Club, Tottenham Hotspur Stadium, London

“A plate of food can now hold as much clout as a limited-edition sneaker drop.”

Vogue Business (2025) 6 Food Trends Fashion Needs to Know About in 2025, 15 January.

## Strategic So What?

Food has become a defining feature of hospitality, shaping how guests choose, experience and remember a venue.

Success requires:

- Embedding F&B into core operations, with restaurants and bars positioned as primary revenue drivers rather than secondary to rooms or events
- Managing menus and formats dynamically, from chef residencies and pop-ups to high-low dining concepts that flex with demand
- Using data to optimise costs and personalise experiences, by unifying POS, inventory and supply systems

F&B now offers some of the most powerful opportunities for innovation, driving new revenue streams, cultural relevance and guest loyalty.



“When choosing hotels, travellers aren’t just booking rooms. They’re booking tables. Hotel restaurants are significantly contributing to hotel revenues, so hotels are stepping up their dining experiences and travellers are paying attention.”

Expedia (2024) Unpack '25: The Trends in Travel, 16 October.

# Cultural Hybrids

## Can single-purpose venues still survive?

The rise of the multi-hyphen experience.

### The Future Forecast

Hospitality is entering its multi-hyphen era. Hotels no longer operate purely as places to stay, nor restaurants as only somewhere to eat. Increasingly, venues are curating cultural ecosystems where fashion, art, music, dining and media intersect. Hotels host artist residencies, fashion labels launch restaurants, and dining rooms double as live stages. These spaces act as incubators where guests co-create as much as they consume.

This reflects wider consumer expectations. Hilton reports that 76% of travellers now seek accommodation offering a variety of experiences within a single stay, while nearly a quarter plan to prioritise live entertainment in their 2025 leisure budgets. The podcast boom has already reshaped design, with recording studios embedded in members' clubs, gyms and hotels. Guests are moving away from compartmentalising their lives between where they sleep, shop, eat or create, and are drawn to spaces that fluidly connect these elements and invite them to participate.

For operators, the opportunity lies in forging new kinds of partnerships and revenue models. Cultural hybrids demand collaboration with fashion labels, record producers, media brands and chefs who bring cultural capital as much as commercial return. Data-led unbundling takes this further, giving guests the option to pay only for the experiences they value, whether that's late-night music programming, access to private fashion previews, or one-off culinary performances. The same thinking is already shaping brand extensions, with

restaurants moving into branded ingredients and merchandise, and hotels testing new forms of retail to drive growth.

The future of hospitality is about curation as much as service. Hospitality is evolving into cultural destinations where sectors collide and living, eating, shopping and performing interweave in new ways. In this landscape, single-purpose venues risk being left behind.

### Pioneers in Action

- UMusic Hotels and VAI Resort are leading by example. VAI, opening in 2025, is being developed as a hospitality and entertainment destination featuring a concert stage, curated retail, dining concepts and immersive guest experiences. UMusic Hotels in Madrid blends live events, ecommerce and branded merchandise with hospitality. Both brands are powered by Oracle's OPERA Cloud, NetSuite and Symphony POS, enabling them to unify operations, manage real-time data, enhance guest experiences and support scalable global growth. "UMusic Hotels is pioneering a new type of experience that blends music, travel, and discovery," says Alberto Lozano Gómez, Senior Director, Southern Europe, Oracle NetSuite (2025).
- Multiple high-fashion brands, from Missoni to Dolce & Gabbana, are partnering with hotel beach clubs and lifestyle spaces across Europe to create co-branded merchandise, pop-up boutiques and branded poolside design. Food and drink mirror brand aesthetics, turning these venues into seasonal cultural experiences built around style, social visibility and guest aspiration.

"True differentiation will lie in curating cultural collisions that guests can't find anywhere else."

The Future Collective (2025).

## Strategic So What?

Single-purpose venues are losing relevance as hospitality evolves into cultural platforms.

This means investing in:

- Cross-sector partnerships with fashion, music, media and F&B brands to bring cultural capital as well as commercial return
- Data-driven unbundling that lets guests customise and pay only for the cultural add-ons they value
- Brand extensions that expand revenue beyond the core, from retail and merchandise to content and live programming

The most resonant venues will be those that sit between sectors, connecting food, fashion, art and entertainment into one living experience.

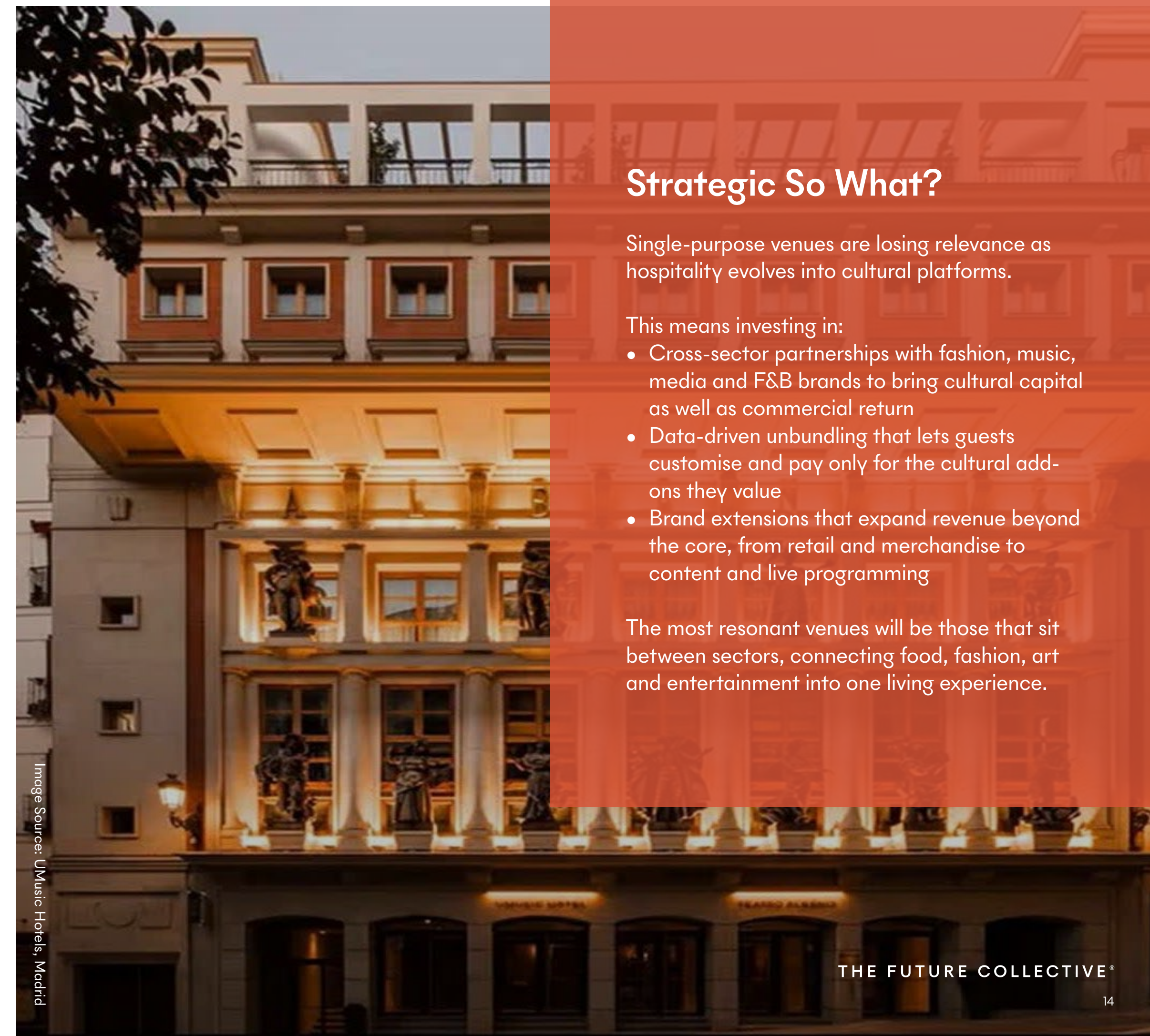


Image Source: UMusic Hotels, Madrid

“Collaboration is creating new ownership models between sectors that rarely worked together before. Luxury brands, music venues and hospitality operators now need their systems to connect, sharing data and even cross-selling, to deliver unified guest experiences.”

Kath Brameld, Oracle NetSuite (2025).

# Healthspan Havens

What if your venue could measurably extend a guest's healthy years?

Hospitality as part of a long-life, high-health lifestyle.

## The Future Forecast

Wellness has become a dominant force across all sectors, not least hospitality. What began with spa add-ons and lighter menus is now influencing venue design, menu development and operational strategy. Now the movement is accelerating into something more profound: the pursuit of longevity itself.

As populations age and consumer focus shifts from lifespan to healthspan, longevity is moving from specialist retreats into the mainstream. Guests are looking for environments that actively extend their healthiest years, turning biological age into a new measure of status. Treatments once confined to clinics, from advanced recovery therapies to sleep-optimising technologies, are now finding a place in hotels and resorts, signalling a change in how hospitality aligns with health science, preventive medicine and emotional wellbeing.

By 2030, 1 in 6 people in the world will be aged 60 years or over (WHO, 2024) and wellness is already shaping demand. KAYAK reports pools, spas and fitness as the most searched hotel amenities globally. Hilton data shows 70% of luxury travellers choose sleep-centric hotels, while more than a quarter book treatments specifically to improve rest.

For hospitality companies, the possibilities extend across many aspects of operations, design and guest experience. Hotels could act as real-time wellness labs, where adaptive lighting, air-quality sensors and recovery technology continuously optimise guest vitality.

Restaurants may position menus as everyday fuel with performance nutrition that supports gut health, metabolic balance and cognition. Stadiums and arenas, with their ability to convene mass audiences, have the potential to pioneer alcohol-free fan zones, health-focused concessions and recovery-led spaces that bring wellbeing into the heart of the fan experience.

This is an opportunity to tackle some of the biggest pressures in modern life, from burnout and sleep loss to rising metabolic disease and declining trust in food systems. By responding to these needs, operators can position their venues as places that actively support longer, healthier lives, nurturing wellbeing as much as they deliver experience.

## Pioneers in Action

- Six Senses Ibiza's RoseBar clinic offers cryotherapy, hyperbaric oxygen therapy, genetic testing and red-light treatments to "Defy the concept of ageing," reframing luxury hospitality around longevity.
- Rocco Forte's Verdura Resort in Sicily has launched a longevity programme following the discovery of an emerging Blue Zone in the nearby Sicani Mountains. Guests undergo diagnostics, follow tailored nutrition and movement plans, and dine on Nourish menus designed around local produce and longevity insights.
- Steel City Stadium at Sheffield Olympic Legacy Park brings performance nutrition into the venue with Food Fusion's café and coworking lounge, offering macronutrient-designed menus that fuel both athletes and the wider community.

Image Source: Six Senses Ibiza

HOSPITALITY FUTURES



## Strategic So What?

Wellness is moving from a lifestyle choice to a longevity imperative, reshaping hospitality at every level.

Success requires:

- Integrated wellness design where health outcomes are embedded into every operational element
- Measurable health partnerships through clinics, biometric tracking, medical-grade treatments, and chef-nutritionist collaborations that turn science into dining
- Cross-revenue wellness ecosystems that generate premium pricing through comprehensive programmes spanning accommodation, dining, fitness and recovery services

The goal is to run wellness as a seamless, scalable business model.

“Sleep tourism will have a new allure, with hotels and retreats offering rest programmes and serene spaces with sleep-enhancing amenities.”

Vogue Business (2025) 15 January.

“We’re set to enter a period where longevity retreats take centre stage (60% of respondents reported an interest in this type of travel), with travellers planning health-focused trips around experiences designed to extend their lifespan.”

Booking.com (2024) Travel Reinvented: Booking.com’s 2025 Travel Predictions, 16 October.

# Distributed Living

## Could hospitality brands become the new landlords?

Branded residences, extended stays and hospitality as the new urban landlord.

### The Future Forecast

Hotels, apartments and workspaces are no longer distinct categories. Instead, hospitality is morphing into hybrid models that combine extended stay, co-living, student housing and even members' clubs. Increasingly, guests are not just checking in, but living, working and connecting within branded ecosystems that resemble neighbourhoods as much as hotels.

Demand for long stays is rising, with many properties now positioned as apartment alternatives for weeks or months at a time. Digital nomads, now 35 million strong globally (The Sunday Times, 2025), are fuelling demand for flexible environments that support both work and leisure. The concept of "bleisure" travel is forecast to grow 500% within the next decade (Statista, 2025), while Deloitte notes that Sunday occupancy is increasing as remote workers stretch weekends into the working week.

This development calls for new business strategies. Hybrid models must balance investor expectations with social and urban realities: addressing housing shortages, enabling mixed-use regeneration, and ensuring hospitality plays a civic as well as a commercial role. The goal for operators is not just to fill rooms but to build communities, where people stay for months rather than nights, and where loyalty grows through daily life.

These new communities are reshaping the social side of hospitality, with brands acting as connectors for increasingly diverse groups. Demand for "third spaces" is rising, as hotels, cafés and restaurants evolve into offices,

networking venues and cultural touchpoints. Food and beverage is central to this: cafés double as co-working hubs, bars as meeting points and communal dining transforms mealtimes into moments of much-needed connection.

The next step is distributed living. Rather than concentrating experiences in towers, operators can embed them across neighbourhoods, creating urban ecosystems where apartments, co-working cafés, restaurants, wellness hubs and cultural venues are all connected under one identity. In this future, hospitality brands become part of the city's infrastructure, shaping how people live, work and eat at scale.

### Pioneers in Action

- The Other House Covent Garden, opening late 2025, positions itself as "your home, as long as you are in town." Its Resident Club model blends apartment-style living with hotel flexibility, combining fully equipped flats with shared lounges, bars, a café and a rooftop.
- LyLo is bringing its pod hotel and co-living concept from New Zealand to Europe in 2025. Aimed at digital nomads, groups and young travellers, it pairs budget-friendly beds with coworking areas, social hubs and wellness spaces. The first property launches in London.
- The Social Hub San Sebastián opened in 2024 as a hybrid model combining hotel rooms, student housing, co-living and co-working. Its F&B offer is designed as a social anchor with a public restaurant open for lunch and dinner, a grab-and-go café and shop, and a large community kitchen.

Image Source: The Other House, Covent Garden, London



## Strategic So What?

Hospitality is evolving into an ecosystem where living, working and socialising converge, and with it comes the need for new operating models.

Success requires:

- Flexible long-stay formats with layouts, services and pricing models tailored to different guest segments
- Unified management systems that integrate accommodation, co-working, F&B and membership revenue streams
- Real-time operational visibility to optimise space utilisation, staffing and inventory across distributed locations

The shift suggests hospitality's role is expanding, from running buildings to shaping the infrastructure of modern living.

“Remote working as a trend continues to grow: one estimate puts the global population of digital nomads at 35 million - if this community were a country it would rank 43rd by population size, not far behind Morocco and Poland.”

The Sunday Times Style (2025) City Limits, 13 July.

“Hybrid hospitality refers to the blending of traditional hotel concepts with living models like BTR, co-living, co-working, members clubs, and student housing. It often means properties cater to at least two different markets within the same building.”

“The extended stay model lies at the intersection between hospitality, mobility, and flexible yet affordable residential solutions.”

Hotel Management (2025) HM on Location: Hospitality's Future Lies in 'Morphing Into Other Asset Classes' 3 June.

# Cool Capital

## What if cold became the new hot?

Emerging cooler-climate hubs and reimagined off-season destinations.

### The Future Forecast

Rising temperatures and overtourism are reshaping hospitality, with the spotlight moving to cooler climates and the off-season losing its meaning. Where once the pull was Mediterranean beaches in peak summer, travellers now look to lesser-known destinations and the allure of fjords, forests and mountain air. As patterns evolve, venues and experiences must flex to meet new demand across shifting seasons and geographies.

Behavioural shifts are already evident. In the UK, 77% of travellers now book off-peak (Marriott Bonvoy, 2024). Research reveals mounting pressure on traditional hotspots: 73% of travellers are worried about overtourism, while 53% plan to avoid destinations such as France, Spain, Italy, Greece, Thailand, The Netherlands and Peru (Global Rescue, 2025). As cities like Nice, Barcelona and Venice move to cap or even ban inbound tourists, opportunities emerge for overlooked destinations with improved infrastructure and connections.

Climate projections also suggest new centres of demand. Countries such as the UK, the Nordics and New Zealand are being billed as potential 'climate-proof' havens, while Alaska has become a fast-rising cruise region, reflecting growing appetite for 'coolcations'.

Heat is changing not just where, but when people go. With 61% of travellers saying they want to spend less time in the sun (Booking.com, 2024), itineraries are shifting towards cooler evenings and early mornings.

'Noctourism' is expanding opening hours for existing attractions while creating new opportunities in stargazing, night markets and cosmic events.

For hospitality businesses, this represents a complete operational rethink. Hotels used to summer peaks need fresh seasonal strategies. Restaurants can build new revenue streams by leaning into evening and winter rituals, from firepit dining to midnight feasts. Stadiums may explore evening events as daytime heat makes traditional scheduling uncomfortable. Cooling systems become essential infrastructure, while marketing pivots from sun-soaked imagery to cooler, more climate-conscious experiences.

Hospitality's future will be less bound by tradition and more attuned to climate, culture and care. Operators that adapt will turn overlooked places and off-seasons into tomorrow's coolest capital.

**“Cold will almost definitely be the new ‘hot’—the Norwegian fjords could become the new Cote d’Azur.”**

Adventure.com (2025) The Future of Travel, 11 January.

### Pioneers In Action

- Meeting rising demand for 'coolcations', Virgin Voyages will introduce 17 Alaska voyages in 2026 with its new ship Brilliant Lady. The routes showcase glaciers, fjords and wildlife, with 86% of cabins offering balconies designed to immerse travellers in the scenery. CEO Nirmal Saverimuttu notes repeat customers are “always challenging us to seek new horizons.”
- Recently known for early nights, London's restaurants including Mountain and The Dover are extending reservations past 10pm, with late licenses signalling growing demand for experiences that thrive after dark.
- Early kick-offs, drinks breaks, closed roofs and even postponements are going to become common features of summer World Cups, according to the IPCC report Pitches in Peril (2025).

## Strategic So What?

The hospitality sector must prepare for inverted seasonality and a reimagined geography of demand.

Success requires:

- Time-shifted programming that maximises evening and night-time revenue opportunities when temperatures drop
- Off-season strategies that transform traditional quiet periods into premium experience opportunities
- Destination diversification towards cooler climates to capture shifting travel patterns
- Climate-adaptive infrastructure that emphasises cooling, shading and flexible indoor-outdoor experiences

The key is making cold feel exclusive, off-season feel premium, and night feel as compelling as day.



Image Source: Virgin Voyages

# 02 Seamless Systems

- Zero-Click Hospitality
- Ambient Intelligence
- Synced Spaces
- Invisible Security
- Conscious Operations

# Zero-Click Hospitality

## What if service became invisible and friction disappeared entirely?

Frictionless service journeys, powered by an integrated hospitality platform.

“38% of hoteliers said they will prioritise aggregating related travel information — for example, when a guest’s flight lands, their Uber is on the way, or where they have off-property dinner reservations.”

Skift and Oracle (2025) Hospitality in 2025: Automated, Intelligent... and More Personal

## The Future Forecast

Hospitality is moving towards a zero-click model, where service dissolves into the background and experiences flow without interruption. Guests no longer wait in lines, juggle multiple apps or repeat their details at every stage. Instead, each point of the customer journey happens invisibly, creating a new rhythm of effortless travel and dining.

The demand for contactless experiences has accelerated in recent years. Oracle and Skift report that more than 60% of hospitality executives see “fully contactless experiences”, spanning check-in/out, food and beverage, room keys and payments, as the most widely adopted innovation by 2028. For Millennials and Gen Z, convenience is an expectation, with 57% of Millennials saying they are likely to be influenced by technology like mobile check-ins (Hotel Guest Technology Report 2025). At the same time, self-service models are gaining traction, with staff available only on request.

Frictionless journeys are becoming the new standard as truly integrated hospitality platforms knit together booking, check-in, pre-ordering, on-site ordering, payment and service. By dissolving silos, these systems make every interaction part of a continuous flow and this reframes service as a spectrum of choice. Guests can move through their experience entirely via phone or biometric ID, unlocking doors, settling bills, ordering meals, even sending automatic requests to housekeeping, or opt for human engagement where it matters most. Convenience becomes control, with guests defining the level of contact that feels right in the moment.

Across the hospitality landscape, venues see growing merit in frictionless systems where facial recognition, biometric validation and real-time translation smooth every stage of the journey. Next-generation stadiums are already adopting biometric entry, cashless concessions, instant replays and personalised wayfinding, showing how zero-click makes even the largest, most complex events feel effortless.

For international travellers, natural language AI and localised payment methods ensure zero-click translates seamlessly across contexts, feeling intuitive everywhere from Madrid to Melbourne.

## Pioneers in Action

- At Otonomus Hotel in Las Vegas, the first AI-powered US hotel, guests use app personalisation, an AI concierge and humanoid robot “Oto” for check-in, requests and tailored recommendations.
- At The Ned London, QR code room service ordering boosted F&B revenue by 16% in three months, cut wait times by 10 minutes, and delivered near-perfect order accuracy (hospitalitynet, September 2025).
- Burger King UK is piloting AI voice ordering in drive-thrus for 2025, showing how conversational AI could eliminate clicks and queues in QSR.
- German stadiums preparing for Euro 2024 introduced facial recognition, Bluetooth, NFC and ultra-wideband access, plus autonomous food stores for contactless concessions.

## Strategic So What?

Zero-click is redefining service. Seamlessness takes over from speed as the measure of progress, with a focus on how far the journey can dissolve into the background while still feeling intuitive and controlled.

Success requires:

- Integrated hospitality platforms that unify booking, check-in, payment and service into a single flow, eliminating silos between apps and touchpoints

- Choice-driven models that let guests decide their level of contact, moving effortlessly between fully automated journeys and human engagement where it adds value
- Frictionless infrastructure, from biometric entry and localised payments to real-time translation that ensures consistency

The winning approach removes frictions guests never want to encounter, while making service feel almost invisible.



Image Source: Otonomus Hotel, Las Vegas

HOSPITALITY FUTURES

# Ambient Intelligence

## What if operations could predict tomorrow's needs today?

Predictive, adaptive operations that respond in real-time.

“Predictive AI in mission-critical systems, like the property management system, can help automate various processes, including forecasting, inventory management and guest service tasks.”

Kath Brameld, Oracle NetSuite (2025).

## The Future Forecast

Automation helps streamline the present, but prediction is what prepares hospitality for the future. Predictive systems are emerging as a quiet layer of intelligence that scans signals and adjusts operations before a decision is needed, turning pressure points into pre-planned responses that reduce strain for operators and keep experiences seamless for guests.

This predictive intelligence is already taking hold across the hospitality landscape. Hotels are experimenting with AI that forecasts occupancy and strategically fills sections of a property, so housekeeping teams work more efficiently. In kitchens, predictive platforms can adjust menus in real time, optimise recipes to match seasonality, or update availability before guests even place an order.

For operators, inventory management is becoming a critical focus as costs climb and volatility increases. Predictive systems can help monitor supply chains more closely, reduce waste and protect margins in an unpredictable market. Some operators are also beginning to experiment with dynamic pricing models, using AI to adjust rates in real time, whether to manage demand, protect margins or encourage off-peak use.

In stadiums, AI reads ticket scans, transport flows and weather forecasts to rebalance staffing, while digital twins simulate how tens of thousands of fans will move, what concessions will sell fastest, and how energy needs will shift minute by minute.

Sometimes the signals come from the obvious, such as bookings, sales and seasonality. But increasingly, they come from the unexpected. As McKinsey notes, operators must “be prepared for sudden, unexpected fluctuations triggered by viral social media and cultural trends.” The opportunity lies in connecting

those dots faster than human teams typically could, then allowing operations to adapt smoothly in the background.

The result is a step change in how hospitality runs, so that operations are not just faster and leaner, but more resilient and responsive. Able to anticipate volatility in demand, supply and costs, and smooth the journey for both operators and guests.

## Pioneers In Action

- Barceló Hotel Group uses Oracle Hospitality Nor1 with its machine-learning PRiME engine to predict the right offer and price for each guest at check-in, delivering predictable upsell revenue and automated, personalised offers through classic predictive AI in daily operations.
- The Leading Hotels of the World, a collection of over 400 independent five-star hotels in more than 80 countries, previously relied on decentralised systems and manual processes. By unifying financial data from 21 subsidiaries into one NetSuite system, the organisation replaced spreadsheets, improved accuracy and automated complex tasks. With real-time visibility, the finance team can deliver consolidated statements faster, saving time and providing better insights for decision-making. This shared foundation also creates the connected, data-rich environment needed to support more predictive, adaptive operations in the future.

## Strategic So What?

Ambient intelligence represents a key shift from reactive to predictive hospitality operations, requiring new capabilities and partnerships to succeed.

Success requires:

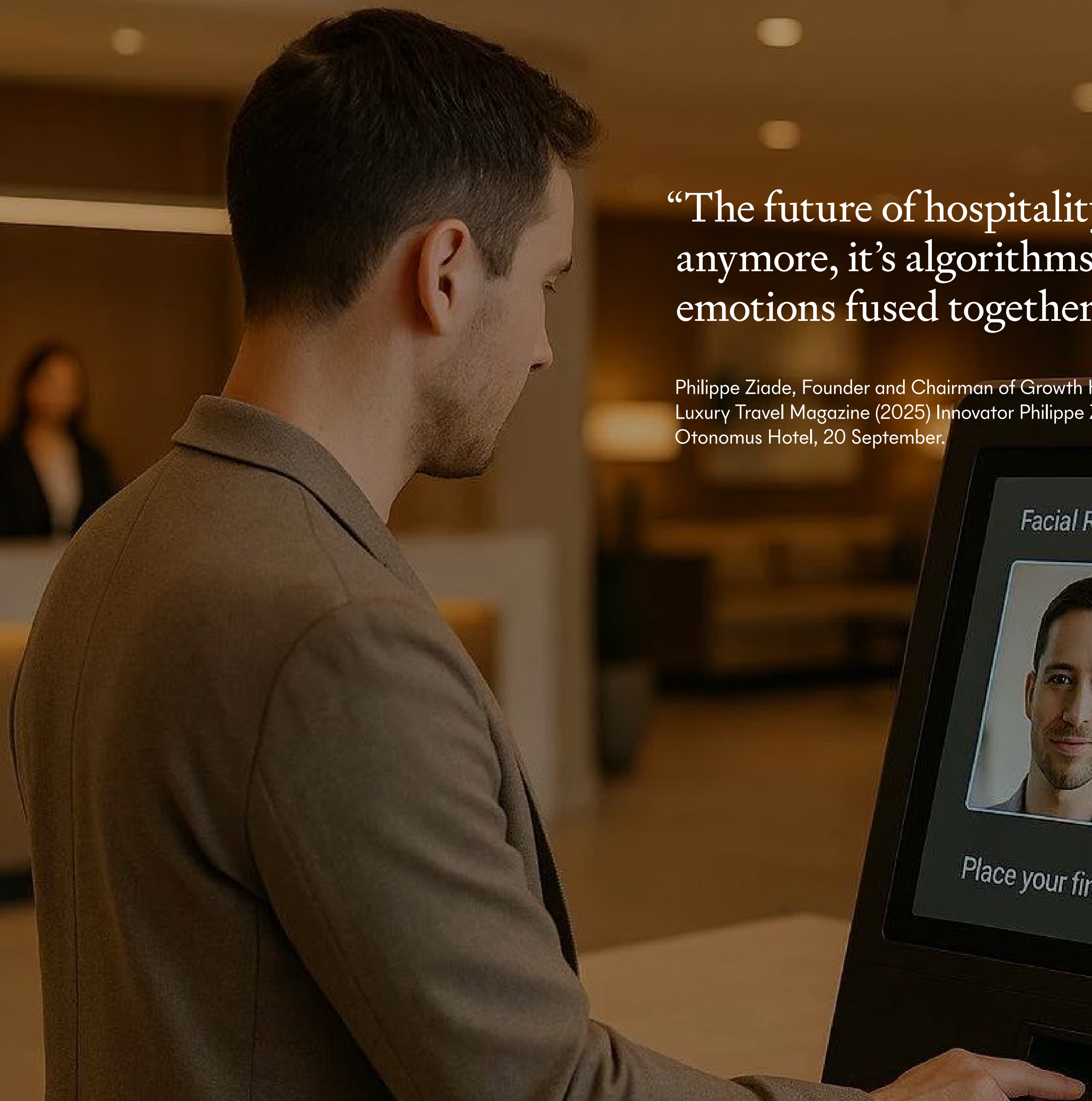
- Predictive platforms that use data to anticipate demand across rooms, dining, events and beyond, ensuring resources are deployed where they'll have most impact
- Smarter supply chains that monitor costs, volatility and availability in real-time, enabling operators to control margins and reduce waste
- Adaptive environments that can model flows of people, energy and services at scale
- Responsible AI practices that maintain transparency, explainability and guest trust as prediction becomes more embedded in daily operations

Building operations that think ahead quietly in the background will ensure hospitality can focus on creating impact in the moment.



“The future of hospitality isn’t rooms and keys anymore, it’s algorithms, insights, and human emotions fused together.”

Philippe Ziade, Founder and Chairman of Growth Holdings (2025) -  
Luxury Travel Magazine (2025) Innovator Philippe Ziade Defines the New Era of AI Hospitality in  
Otonomus Hotel, 20 September.



# Synced Spaces

## What if every venue tuned itself to your body and mind?

Hyper-personalisation across service, menus and environments.

“Companies can use AI to create hyperspecific customer segments to guide how they interact with and serve customers. Segmentation can be based on a single macro characteristic, or it can be so specific as to relate to just one customer.”

McKinsey (2024) What Is the Future of Travel? 7 June.

## The Future Forecast

Hospitality has long promised personalisation, but remembering a name or offering an upgrade is no longer enough. Guests are beginning to expect environments that adapt not only to their preferences but also to their physiology. The next opportunity lies in experiences that respond in real time to circadian rhythms, emotional states and individual health needs.

Today, personalisation often means carrying preferences across venues, from dining choices to seating or entertainment. But the next wave goes deeper. Persistent guest profiles could soon move fluidly between environments, integrating biometrics, emotional data and behavioural signals. That would allow lighting to support energy patterns, menus to flex to dietary needs and soundscapes to shift with mood. The Hotel Guest Technology Report 2025 shows 58% of guests already believe AI can anticipate their needs, pointing to an appetite for this shift from convenience to synchronisation.

Some venues are beginning to experiment with these ideas. Hotels are trialling voice-activated rooms that adapt lighting, temperature and art to personal profiles. Restaurants are exploring AI-driven menus built around microbiome insights. Stadiums are enhancing matchdays with hyper-personalised services, from instant replays to tailored content streamed straight to fans' devices.

Delivering this vision won't be easy, as it depends on advanced data capabilities and consumer confidence. Companies will need AI and analytics to segment down to the individual level, while earning guest trust through transparency and control. If they succeed, the rewards will be significant. McKinsey finds 78% of consumers are more likely to make repeat purchases when offered a personalised experience.

For hospitality, the future moves beyond customised service to synchronised spaces that feel biologically aligned with every guest. Experiences will no longer just reflect what people book or buy, but who they are, why they are there, and how they want to feel, with AI designing endlessly unique interactions from values, routines, behaviours and emotional states.

## Pioneers In Action

- Equinox Hotel New York has introduced The Sleep Lab, where rooms adapt to each guest's programmed sleep and wake times. Lighting, sound and ambiance shift automatically, while adaptive mattresses provide personalised temperature control and sleep-stage monitoring. Guests can review their sleep data each morning, turning rest into a fully optimised experience.
- At the new Nao longevity spa in Crete's Minos Palace Resort, biometric and epigenetic testing informs fully customised meal plans alongside tailored sleep and movement programmes. Nutrition becomes a core pillar of hospitality, with dining shaped by each guest's cellular health and metabolic profile.
- In the US, the NFL has built a digital foundation using tools like the Adobe Experience Platform and Journey Optimizer to deliver personalised content, campaigns and offers based on fan preferences, region, behaviours and engagement.

## Strategic So What?

Personalisation is no longer enough. The focus moves to self-curation, where technology empowers guests to take control and shape experiences around their needs.

Success requires:

- Biometric intelligence that interprets signals like sleep cycles, stress levels and health data to shape lighting, menus and ambiance dynamically
- Seamless data flows that carry persistent guest profiles across brands and settings, ensuring continuity between stays, meals and events
- Adaptive environments where infrastructure, from room layouts to digital interfaces, can reconfigure instantly to align with individual needs

This pushes venues to act as responsive environments that tune not just to preferences, but to individual biology and psychology.

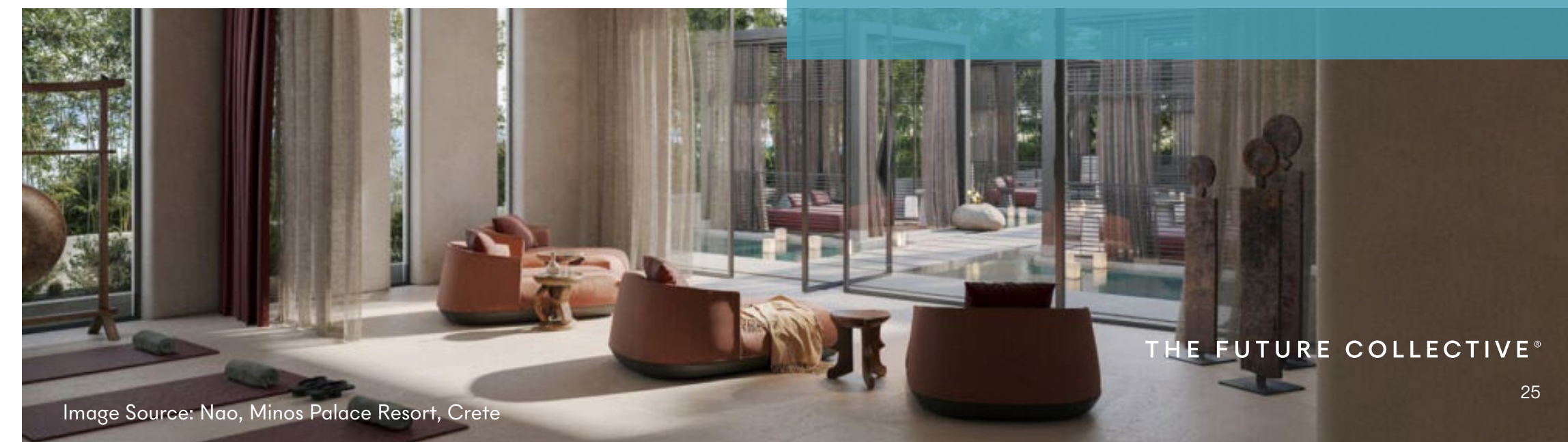


Image Source: Nao, Minos Palace Resort, Crete

“It’s no longer just about personalisation. It’s about self-curation, with technology empowering guests to take the driver’s seat and shape their journey on their own terms.”

The Future Collective (2025).

# Invisible Security

## Can safety become a silent part of hospitality?

Always-on, predictive safety measures that fade into the background.

“Understanding crowd dynamics is so important to us. Sometimes we face disorder, so understanding how to move people around a venue is key.”

Chris Sykes, Assistant Chief Constable, Greater Manchester Police (2025).

### The Future Forecast

Rising violence against frontline service staff and heightened risks at large events are pushing hospitality to rethink security. In the UK, 37% of customer service workers are considering leaving their jobs due to aggressive customer behaviour (The Institute of Customer Service, 2025), while hotels and stadiums face growing pressure to protect against crowd incidents and security threats. The challenge is urgent, but so is the need to preserve the sense of comfort that defines hospitality.

The problem is also evident in retail, where rising theft and violence have led to locked doors, body-worn cameras and overt policing. But this approach doesn't translate well to hospitality. Guests expect safety, but they also expect openness. Heavy-handed measures risk eroding trust and undermining experience.

The future of safety lies in invisible systems, with seamless, technology-enabled layers that are increasingly proactive rather than defensive. In hotels, predictive tools and discreet access controls

can protect staff and guests without disrupting the guest experience. Restaurants can safeguard late-night workers through monitoring and secure layouts that feel natural. Stadiums are embracing biometric ticketing, crowd-intelligence and predictive analytics to spot risks early while keeping the fan experience open and celebratory. Crucially, as these systems expand, strong governance around privacy and compliance with data regulations such as GDPR will be essential to maintain consumer trust.

Invisible security creates safety without visible barriers, making trust and comfort integral to the experience for both staff and guests.

### Pioneers In Action

- Abu Dhabi's Department of Culture and Tourism is rolling out a face-recognition system across hotels, streamlining check-ins while strengthening guest safety. Following pilot testing, the initiative is expanding from five-star properties to all hotel categories, reinforcing Abu Dhabi's status as the world's safest city while embedding invisible

security into seamless hospitality.

- Facial recognition systems are becoming common across European stadiums, with FC Copenhagen among the latest to adopt the technology. Meanwhile, Brazil has mandated face biometrics for all stadiums with a capacity of over 20,000 (Biometric Update, 2025).
- During a Manchester United vs Arsenal match in March 2025, Greater Manchester Police and LSE trialled N-AI's AI-powered monitoring platform at Old Trafford. Live drone footage was processed in real time to deliver crowd-density analytics and predictive insights, improving situational awareness and resource deployment. The system was tested during a pre-match protest, enabling police to respond quickly and prevent escalation.

## Strategic So What?

Hospitality leaders should plan for a future where security is silent, seamless and trusted.

Success requires:

- Embedding predictive and discreet technologies into hotels, restaurants and stadiums to safeguard staff and guests without breaking immersion
- Embedding data security and GDPR compliance into every layer of biometric and AI-enabled systems enhances safety and builds trust, rather than eroding it

- Designing security measures that feel intuitive and invisible, protecting workers in vulnerable moments and preventing incidents before they escalate
- Balancing operational efficiency with ethical responsibility, making safety both a brand differentiator and a source of guest confidence

The venues that thrive will be those where people feel protected without ever noticing the protection.



# Conscious Operations

## Is zero impact the new baseline?

Carbon-positive, self-sufficient, waste-free operations.

“If hotel food was a country, it would be in the top 25% of nations ranked by their emissions.”

Systemiq (2024) Decarbonising Hotel Food Systems, December.

## The Future Forecast

Hospitality is entering an era where efficiency, resilience and responsibility come together. The bar is rising from “doing less harm” to actively giving back, with operations designed to be carbon-positive, waste-free and self-sufficient. Venues are increasingly viewed as ecosystems in their own right, blending circular practices with regenerative design.

Hilton reports that 62% of travellers value sustainability communications, while 73% want to minimise their impact while travelling. In France, 74% cite at least one Corporate Social Responsibility (CSR) factor when choosing where to stay (Convivio, 2025). Expectations are moving so quickly that sustainability is now seen as standard.

Technology is the accelerator making ambitious goals achievable. AI systems track waste in real time, predictive analytics optimise supply chains and smart platforms balance energy demand. Meanwhile, EU regulations like the Deforestation Regulation (EUDR) and Corporate Sustainability Reporting Directive (CSRD) require data-rich, transparent operations, making compliance a driver of adoption.

National shifts are reinforcing this momentum. France is mandating reusable packaging, German diners are rewarding restaurants that adopt it and Swedish operators are shortening supply chains to manage costs and carbon.

Across the hospitality value chain, innovations point to a regenerative future. Hotels will operate on self-sufficient energy models with closed-loop water and waste systems. Restaurants will harness AI to eliminate food waste and provide full sourcing transparency. Stadiums will function as living infrastructures, powered by solar arrays, harvesting rainwater and integrating green walls.

With energy and food costs rising, waste reduction and resource efficiency are as much resilience strategies as climate ones. The future of conscious operations lies at the intersection of technology, regulation and expectation, creating hospitality ecosystems that give back more than they take.

## Pioneers in Action

- Six Senses Rome has introduced a sustainability blueprint with 100% renewable energy, rainwater capture and on-site bottling to eliminate single-use plastics.
- Hilton has deployed Winnow, an AI-powered food waste management platform, in nearly 200 hotels globally to track, analyse and cut food waste.
- FC Barcelona’s Camp Nou redevelopment integrates solar roofing, rainwater harvesting and advanced energy management to power the stadium while reducing dependency on city grids.

## Strategic So What?

Conscious operations deliver cost efficiency alongside sustainability impact.

Success requires:

- Investment in technologies that enable real-time tracking of energy, waste and water
- Integration of circular practices across the value chain, from sourcing and food systems to utilities and construction
- Transparent reporting and communication that meet tightening regulations and build trust with guests

Sustainability must be viewed as a value driver, creating venues that restore ecosystems, strengthen communities and set new expectations for what hospitality can give back.



Image Source: Six Senses Ibiza



Image Source: Winnow

“Stadiums are expected to run on 100% renewable energy in the future and optimise energy efficiency with AI and IoT use.”

Sportcal (2024) What Will the Sports Stadiums of 2035 Look Like? 4 October.

# 03 Vital Connections

- Discovery Journeys
- Human Last Mile
- Talent Cultivation
- Emotive Loyalty
- Civic Anchors



# Discovery Journeys

What happens when traditional booking disappears and discovery becomes the experience?

Booking evolves into personalised, immersive discovery powered by socials, agentic AI and AR.

## The Future Forecast

The familiar booking scenario of endless tabs, scrolling and price hunting is giving way to something more engaging. Hospitality is increasingly discovered rather than researched, shaped by social feeds, AI tools and virtual previews. A new wave of “travel-tainment” is taking hold, where storytelling, entertainment and peer content drive decisions.

For younger consumers especially, the line between inspiration and reservation is already disappearing. Social feeds are becoming storefronts, with 62% of Gen Z finding their #travelinspo on TikTok or Instagram (KAYAK, 2025).

AI is set to introduce a new wave of disruption. Agentic assistants will anticipate preferences, from seat selection to departure times, and increasingly act on a consumer’s behalf. For hotels, restaurants and stadiums, the priority is shifting beyond SEO and mobile optimisation towards securing visibility within the AI-driven ecosystems where decisions are made.

Visual immersion adds another layer. One in three travellers already want to preview hotels virtually before booking (Skift and Oracle, 2025). Virtual and augmented reality open new ways to explore event spaces in hotels, table and kitchen views in restaurants, or seat selection and enhanced feeds in stadiums, making discovery more tangible than ever.

Discovery now stretches the guest journey far beyond arrival. As Kath Brameld notes, “Hospitality businesses need to examine how they fit into the technology ecosystem that customers use to discover and evaluate options. This positioning is increasingly critical.” As booking becomes more personalised, intuitive and socially connected, operators must recognise this as the first chapter of the guest experience, where engagement, loyalty and storytelling begin.

## Pioneers in Action

- Radisson Hotel Group has launched Radisson Meetings Unbound and its AI-powered Dream Machine, giving event planners tools to co-create and visualise meeting concepts through generative AI. Immersive “infinity rooms” and digital replicas of venues allow organisers to experience event spaces before booking, reshaping discovery into a creative, sensory process.
- Google’s AI Mode can now find and surface restaurant reservations for users, displaying real-time availability via partners like OpenTable, and tailoring recommendations based on past preferences. This signals how discovery and booking are merging into one seamless, agentic process.
- Co-op Live has become the first arena outside of North America to launch Virtual Venue, Ticketmaster’s 3D tool that lets fans preview their seats, including the view they offer, before making a purchase. Virtual Venue simulates 360-degree views from every seat in the arena, whether on mobile or desktop, so fans can compare sightlines and make more informed decisions when buying tickets.

“80% of Millennials and Gen Z like the fast convenience of using travel planning apps or social media to help them plan their travel journey.”

American Express Travel (2025) 2025 Global Travel Trends Report.

## Strategic So What?


Discovery is no longer a straight line from search to booking, but an ecosystem of feeds, AI agents and immersive tools. Hospitality must prepare for a world where inspiration and reservation are inseparable.

Success requires:

- Making hotels, restaurants and stadiums bookable directly through social feeds, with content designed for instant conversion as well as inspiration

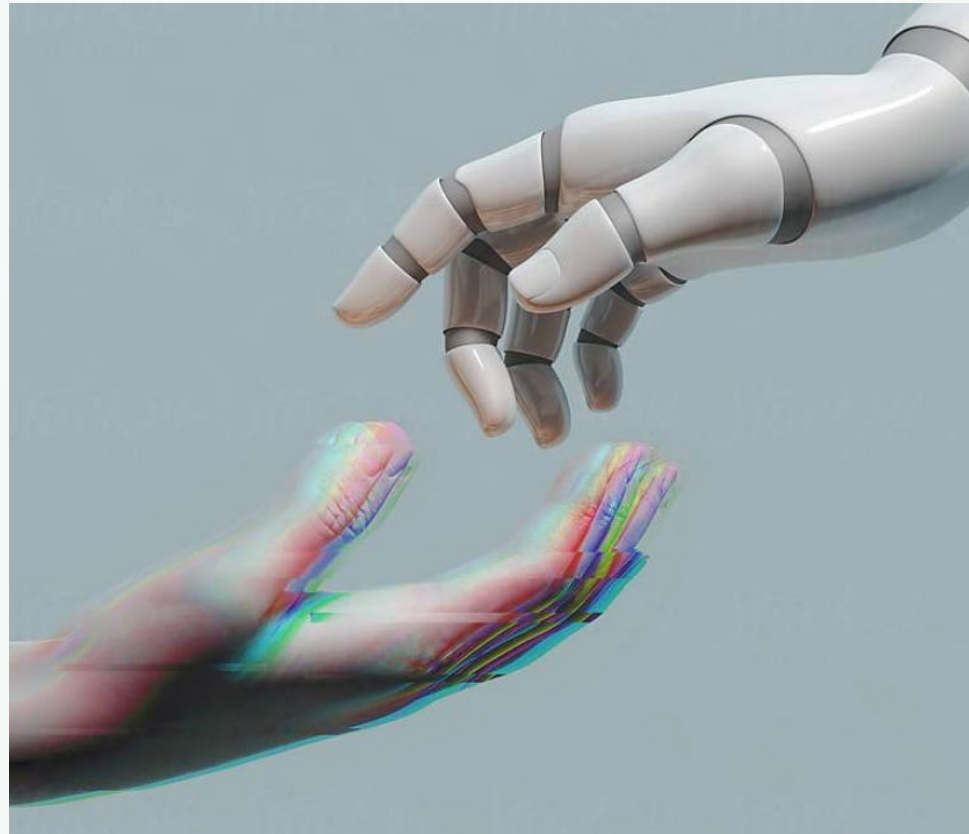
- Ensuring data, inventory and experiences are optimised for AI assistants that will increasingly recommend and book on behalf of consumers
- Using AR and VR to provide tangible previews of spaces, reducing uncertainty and building anticipation

Discovery works best when it feels effortless and engaging.

A woman with long brown hair, wearing a light blue button-down shirt and dark blue jeans, is sitting on a silver suitcase on a train. She is looking down at a smartphone in her hands. A large, light-colored woven basket is hanging from her shoulder. The background shows the interior of a train car with windows and wooden paneling.

“Social shopping has become the new normal with TikTok and Instagram; however, this growing e-commerce trend has just scratched the surface with bigger-ticket categories like travel. Half of consumers say they have wanted to book a trip they saw on their social feeds.”

Expedia (2024) Unpack '25: The Trends in Travel, 16 October.



# Human Last Mile

What if AI could anticipate every request, but the human touch became the ultimate luxury?

Augmented workforce where human touch becomes a premium.

## The Future Forecast

Automation is rapidly streamlining the basics of hospitality. Guests are already comfortable using chatbots for simple tasks, with 70% saying they find them helpful for inquiries like WiFi passwords or late check-outs (Hotel Tech Report, 2024). But when it comes to complex needs or moments of friction, technology can smooth the journey, but it can't replace human care. As Kath Brameld observes, "No-touch service is great when everything's going right. When it's not, people need another person for assistance." The division of strengths is clear: machines excel at efficiency, while humans excel at connection.

Virtual employees are starting to find their place in hospitality's service ecosystem. Early AI concierges can handle reservations, recommend itineraries, or resolve basic requests across channels, helping to reduce pressure on stretched teams. Chatbots are also being deployed as always-on front-line responders, offering quick answers and triaging more complex queries. Adoption is still limited, but these systems show how automation can extend availability and consistency, leaving space for humans to focus where they add the most value.

This is the essence of the human last mile. AI and automation are reshaping roles, allowing staff to spend less time on routine administration and more on presence, personality and empathy. Mobile property systems give staff the freedom to roam venues and serve guests directly, while algorithms flag high-value visitors or anticipate special requests. Yet it's the human response of noticing, listening and adapting that converts these efficiencies into trust and emotional attachment. With the industry in the UK still short around 132,000 workers compared to pre-pandemic levels (UKHospitality, 2024), every human interaction is not only scarce but increasingly valuable.

Across venue types, this human premium is emerging. Hotels use AI to anticipate needs while redeploying staff for face-to-face moments. Restaurants automate ordering and payment but lean on sommeliers and chefs for tableside storytelling. Stadiums invest in self-service concessions but position high-touch lounges as exclusive, high-margin offerings. Like first-class cabins in air travel, personalised human service is becoming a luxury tier: scarce, memorable and valuable.

When staff spend less time on administrative tasks, they have more capacity for the meaningful encounters

that drive loyalty and premium pricing. Technology becomes the foundation that allows human connection to flourish.

## Pioneers in Action

- Oracle OPERA Cloud deployment at Rotana's 79 hotels and Hyatt's global properties enables staff to access guest data and manage operations from anywhere on-property, enabling roaming, personalised service beyond the front desk.
- Four Seasons is piloting holographic communication devices at the Beverly Wilshire, allowing guest experience staff to "live beam" into its most prestigious suites. The innovation blends high-touch human service with cutting-edge tech, reinforcing the brand's view that personal engagement remains the ultimate differentiator in luxury hospitality.
- In the US, restaurant chain Red Lobster is rolling out SoundHound AI's voice automation to manage takeaway calls. The system answers every call, inputs orders directly into POS, and reduces staff workloads, allowing teams to focus on improving in-person service.

"AI tools can free up frontline workers' time, allowing them to focus more on personal customer interactions. These tools can also shorten the training time for new hires and quickly upskill the existing workforce."

McKinsey (2024) What Is the Future of Travel? 7 June.

## Strategic So What?

The human last mile transforms service from functional to emotional, turning staff presence into hospitality's core premium.

Success requires:

- Smart task allocation that frees staff from routine admin and focuses them on high-value interactions
- Mobile tools and data insights that let teams deliver personalised service anywhere across a venue

- Skills transformation that develops staff expertise in empathy, cultural intelligence and complex problem-solving, preparing teams for higher-value human interactions

When technology takes care of efficiency, people can deliver what matters most: moments of connection that build lasting loyalty.

“Mobile services mean more availability of staff, for anything at any time. Self-service technologies and chatbots can address and redirect guest requests more efficiently, meaning guests can have their needs met faster. If hotels introduce the options and clearly explain when it may be appropriate to use these features, guests are more likely to understand their additive value.”

Skift and Oracle (2025) Hospitality in 2025: Automated, Intelligent... and More Personal



# Talent Cultivation

## Can hospitality become a career of choice, not chance?

Transforming hospitality from stepping-stone jobs to destination careers.

### The Future Forecast

Hospitality is often seen as a first step into the world of work, valued for its flexibility but not always recognised as a long-term path. With greater investment in skills, leadership and digital expertise, the industry can change perceptions and position itself as a place where people build lasting, fulfilling careers.

Research has revealed a significant workforce crisis. Kath Brameld notes that analysis of European businesses shows turnover rates of 70–80% annually. In the UK, the sector has lost almost 90,000 jobs since late 2024, accounting for more than half of all national job cuts (UKHospitality, 2025). Staff shortages, skills gaps, wage inflation, dissatisfaction and mental health concerns are eroding employee wellbeing, driving down guest satisfaction and threatening profitability.

COVID dramatically changed worker expectations, pushing people to question long hours, inflexibility, poor work-life balance and wages that don't match the

demands of the role. Hospitality was among the first sectors to be targeted for change, as workers prioritised mental health and wellbeing over traditional career stability. At the same time, customer relations have become more demanding, intensifying operational pressures on already stretched teams.

To attract and retain talent, hospitality must modernise the employee experience in line with other sectors. That means moving away from outdated ways of working and opening up to more diverse profiles, while offering flexible scheduling. Digital tools can take the strain out of repetitive or administrative tasks, freeing people to focus on the meaningful parts of service. Just as importantly, career pathways are being reimaged with structured training and development, cross-functional mobility, workplace design that embeds wellbeing, and leadership programmes accessible at every level.

Reframing hospitality will mean clearer entry routes, stronger employer brands and visible paths for growth across hotels, restaurants and stadiums. Meeting guest expectations for world-class experiences depends on giving staff the same quality of opportunity.

### Pioneers in Action

- Accor has launched its “Enjoy & Feel Valued” Employee Value Proposition to move beyond process-driven approaches and attract both younger professionals and career changers. The group has already taken steps to align with the future of work, embedding innovation and self-fulfilment into its culture. Global wellness initiatives include the Get Active, Heartists! app, which engages 1,600 employees across European hotels in team and individual sports challenges.
- Cote Hospitality’s G.U.I.D.E. Mentorship Program develops future leaders through a six-month course of bi-weekly coaching on team building, emotional intelligence, and problem-solving, aligning talent growth with long-term mission.
- Starbucks needed to streamline and standardise training for 350,000 global employees. By creating a centralised video learning hub with robust content control and analytics, it now delivers consistent, engaging content across languages and devices, achieving 90% completion rates on some of its most-watched videos.

“Just 70% of firms said they felt positive about growth in 2025, down from 80% a year ago. Only 11% say they have recovered fully from the past five years.”

Convivio (2025) The Future(s) of the Hospitality Industry, 17 May.

## Strategic So What?

More than stopgap fixes, the workforce crisis demands leaders take bold steps to transform their value proposition and make the industry truly aspirational.

Success requires:

- Flexible scheduling systems that give staff greater control over shifts and work-life balance

- Visible career pathways, with structured training and mobility across departments and venues
- Wellbeing built into workplace design, from safe late-night environments to supportive leadership
- Automation of repetitive tasks, so staff spend more time on meaningful guest interactions

Loyalty starts with staff, and those who feel valued are the ones who deliver value back to guests.

“Incorporating new technologies, such as mobile, contactless, virtual, personalisation, gamification, and more, would help bring in the next generation of hotel staff.”

Skift and Oracle (2025) Hospitality in 2025: Automated, Intelligent... and More Personal.



# Emotive Loyalty

## What if loyalty was built on values, not vouchers?

Values-based loyalty ecosystems that go beyond points.

### The Future Forecast

Traditional loyalty programmes are losing relevance. McKinsey reports falling satisfaction with hotel, airline and cruise schemes, while travellers feel greater loyalty to Amazon than to the six biggest travel brands combined, despite it offering no rewards at all. Expectations keep rising, but many operators continue to see loyalty as a commercial tool rather than a guest experience strategy, widening the gap between what people want and what brands provide.

What's rising in their place is a demand for loyalty that feels more personal, emotional and values-driven. Guests increasingly expect schemes to reflect what matters to them, whether that's sustainability, wellness, cultural enrichment or community impact. As Kath Brameld explains: "You don't return to a brand to accumulate points. You return because you have an emotional attachment."

The challenge is that price still has a powerful hold. With 72% of consumers anticipating higher travel prices in the future (Kayak, 2025), many will switch brands for a better deal. However, transactional rewards alone won't stop that. To stay relevant, loyalty

has to cut deeper, blending value with values.

The future points towards ecosystem loyalty. For hotels, that means programmes that go beyond room upgrades to include wellness credits, sleep-focused benefits or access to local cultural experiences. In food and drink, it's about rewarding engagement and community, not just spend. And in stadiums and large venues, loyalty can expand into connected fan ecosystems, where tickets, F&B offers and retail perks live inside a single platform. Global booking platforms like those emerging in Asia through WeChat and Grab are evolving into super-apps that integrate travel with retail, restaurants and lifestyle brands, creating loyalty systems that span multiple touchpoints rather than single transactions. Western booking platforms are beginning to explore similar partnerships.

Loyalty is no longer just about retention mechanics. It's becoming an ecosystem of trust and attachment, where transactional ease meets emotional connection, and where guests feel recognised for who they are as much as for what they spend.

### Pioneers in Action

- Wagamama Soul Club goes beyond free sides to build emotional connection. Powered by Oracle CrowdTwist and Symphony, the app rewards visits with access to recipes, cooking content, and secret menu items. Frequent guests are invited to supper clubs and cooking classes, while VIP status unlocks exclusive merchandise drops.
- Accor ALL Accor+ unifies regional loyalty schemes into a global subscription model spanning 30+ brands and 4,500 hotels. More than just discounts, it's designed to build consistency, deepen member recognition, and connect travellers into Accor's wider ecosystem of partners and experiences.
- FC Bayern Munich x Deutsche Telekom creates a multi-layered partnership, combining 5G-enabled fan experiences, eSports, and youth football with social impact initiatives like Red Against Racism. Through the Magenta Moments programme, fans access backstage tours, pitchside seating and exclusive events that strengthen emotional bonds between brand and club.

**"Loyalty is shifting from transactional perks to emotional connection, built on experiences that feel personal and lasting."**

Kath Brameld, Oracle NetSuite (2025).

### Strategic So What?

Success will depend on reimagining loyalty as more than rewards.

That means:

- Integrated experience ecosystems that connect travel, retail, dining and lifestyle services, moving beyond isolated hotel or airline programmes
- Community-driven engagement platforms that create connections, shared experiences and peer-to-peer value beyond points and discounts

- Real-time personalisation that delivers meaningful moments across every touchpoint, making guests feel recognised rather than simply rewarded

Loyalty is moving beyond repeat bookings to become a network of trust, recognition and emotional attachment.



### The Future Forecast

Hospitality is no longer just about serving guests. Venues are playing a greater role in civic life, framed as neighbourhood anchors rather than transient spaces. From hosting community events to supporting local businesses and providing critical infrastructure during crises, hotels, restaurants and stadiums are being redefined as indispensable public assets. This ties hospitality more closely to civic and social purpose, embedding venues into the daily lives of their communities.

This evolution is partly guest-driven. 53% of travellers now say they are conscious of tourism’s impact on local communities, while 73% want their spending to benefit local economies (Booking.com, 2025). At the same time, social and environmental pressures are reshaping the industry’s responsibilities. As Convivio notes, “It is no longer simply about providing services to customers, but about integrating into the local ecosystem, reflecting the community, and playing an active role within it.”

The role of hospitality is widening in scope. Hotels are no longer focused solely on overnight guests, but on non-residents who might use gyms, lobbies or coworking spaces by subscription. Restaurants are rediscovering their place as cultural and social connectors, hosting workshops, markets and collaborations that embed them more deeply in their neighbourhoods. And stadiums, often built with public funding, are being reimagined as multi-purpose destinations, combining retail, leisure, hospitality and even housing, so they regenerate districts and generate revenue well beyond ticket sales.

Rather than being judged only by service or design, venues will be valued for their civic contribution: how well they reflect community, share resources and build resilience.

### Pioneers in Action

- The Social Hub is a European hospitality brand that blends hotel stays with a community-focused experience for guests, coworkers and locals. It runs 6,000+ events annually and supports young changemakers through its Talent Foundation. Recent openings in Florence and Rome include major public parks and rooftop gardens, positioning the brand as an urban regenerator and a neighbourhood hub.
- Soho Farmhouse Ibiza is designed as a year-round community hub, not just a summer destination. By supporting local farming, wellness practices and cross-community connections, it aims to become a cultural anchor for the island’s diverse residents.
- Knighthead Capital’s proposed 60,000-seater stadium for Birmingham City is planned as the centrepiece of a £3bn mixed-use development, while Manchester United’s new 100,000-capacity venue is tied to a government-backed project to revitalise west Manchester. Both position stadiums as anchors for urban regeneration.

# Civic Anchors

What if hospitality was measured by its local impact?

Hotels and venues as indispensable parts of local life.

“Some investors see football stadiums as the cornerstone of far grander ambitions for regeneration.”

FT (2025) Multipurpose, Premium and Always Open - Clubs Eye Next Generation of Stadiums, 15 May.

### Strategic So What?

Hospitality leaders must prepare for a future where local impact is as important as guest experience. To be seen as civic assets as much as commercial ones, success will require:

- Embedding community use into design, programming and operations, from open lobbies to local memberships

- Diversifying spaces so hotels, restaurants and stadiums serve multiple roles, from cultural hubs to crisis infrastructure
- Building ethical accountability into governance, ensuring decisions benefit guests, locals and the wider environment
- Reframing value beyond revenue alone, measuring success through trust, reputation and resilience

Those who thrive will be the ones seen as indispensable, both to guests and to their communities.

“With a 7,000-square-metre rooftop ‘sky park’ in Florence and a 10,000-square-metre ground-level park in Rome, The Social Hub offers its new spaces to the general public as part of its commitment to setting a new standard for destination hospitality, where travellers, students, professionals and locals connect side-by-side.”

The Social Hub, 2025.

# Conclusion

## The next chapter of hospitality

Hospitality is no longer defined by rooms, meals or tickets sold. It has become a stage for culture, commerce and community, where people gather to connect, celebrate and belong.

Behind the scenes, however, the industry is more complex than ever. Operators must reconcile the demands of real estate, brand and technology, all while delivering experiences that guests perceive as seamless. Intelligent systems and AI are rapidly raising the bar: automating what can be automated, predicting needs before they are spoken and enabling staff to focus on moments that matter most.

The three pillars of hospitality's future — Magnetic Places, Seamless Systems, and Vital Connections — offer the framework for this transformation. Together, they define how the industry can flex with evolving lifestyles, integrate operational resilience and still deliver the authenticity that makes every experience memorable.

The next decade will belong to those who see technology and humanity not as opposing forces but as complementary strengths. Intelligent systems can amplify empathy, while human connection gives meaning to even the most advanced operations. By aligning people, processes and technology, leaders can build resilience and growth, and prove that hospitality is one of the most powerful drivers of loyalty and value in the modern economy.

Far from a distant horizon, hospitality's future is being written now. Its direction will rest with the leaders who choose to act with courage and confidence.



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