



OUTLOOK 2027 · AN INDEPENDENT BRIEFING

Who holds the keys?

Twelve hotel AI trends for 2027: what AI may now decide for a hotel, what has been shown to work, and what to switch on next.

Cross-Point · Zug, Switzerland



Twelve trends. Each tag shows the action for a full-service hotel.

ACT NOW **PILOT**
MONITOR **DEFER**





A LETTER FROM THE AUTHOR

Who holds the keys?

I wrote this report to help hotel owners and operators decide where AI is useful, what to test, and what can wait.

My starting point is more than thirty years leading luxury hotels across Europe and Asia, and my work today advising owners and operators. Running hotels taught me to ask practical questions of any technology. Does it help the guest, make the team's work easier, or improve the business? What does it cost, and who is responsible? When can a manager still change the outcome, and does the benefit reach the hotel that pays for it?

Across twelve trends, I examine what is available, where hotels are using it, and what results have been reported. I distinguish published evidence from claims and my own judgment. Where we do not know enough, I say so. Where my experience leads me to recommend action before the published evidence is complete, I explain the scope and the limits.

AI can now answer guests, take bookings and publish prices. Each task needs clear limits and someone accountable for the result.

Start with the systems already running in your hotel. What may they do without asking? Who checks their work? Those answers will help you decide what to switch on next.

This report was a great project. Thank you to everyone who helped research, proofread and contribute to it. I am grateful to each of you.

Riccardo Giacometti
Founder, Cross-Point
Zug, October 2026

Every number in this report says who reported it.

Three systems run through this report: the evidence badge with its reporter word, the four action keys, and the authority ladder on page 16, which grades what an AI system may do without asking a person. This page sets out the first two, and the boxes that carry the author's own view.

Who reports the results

Hotel AI results are published, almost without exception, by the operator or the vendor. Two hotel-level studies of AI outcomes cited here are independent of the seller, an academic pricing pilot and a five-site food-waste study, both read as abstracts.

We ask three separate questions of every trend: does the capability **exist**, are hotels **using** it, and has it been **shown to improve** results?

Independence

This report is free, has no sponsor, and no vendor or operator reviewed it. Operator figures are shown as published; none is confirmed beyond that. The research rests on published documents; the boxes marked Riccardo's view rest on the author's experience (page 42).

Published evidence to 9 October 2026; author commentary and the verification update to 16 October. Superscript numbers refer to the sources on pages 44 to 47. The companion files, with the evidence ledger, are at giacometti-consulting.com.

The four action keys

ACT NOW

Move now, within the scope written under the key. The product is established, it matters, and a wrong step costs little.

PILOT

Test it. Promising enough for a controlled test, with a baseline to compare against and a rule for stopping.

MONITOR

Watch it. It matters, and it needs more evidence or a more mature market first.

DEFER

Wait. Today the risks, costs or missing prerequisites outweigh the case.

A missing proof of return is not, by itself, a reason to defer.

The evidence badge

VERIFIED official	A primary source with standing to state it, read in full: an official statistic, a court decision, a filing, a platform or company on its own launch, independent research.
QUALIFIED operator	As stated by an interested party, the operator, the vendor, a sponsored survey or an owner, in its own release or as reproduced by the press; the word names the party.
LOW CONFIDENCE abstract	An abstract only, a gated study, a recap, or a press report with no identified party behind the figure.
NOT FOUND	Searched, with no public evidence found: an absence of evidence, never proof of absence.
OUTLOOK	Our judgement or a scenario. No probabilities are attached.
 RICCARDO'S VIEW	Personal judgement, from the author's experience and an interview summary of 16 October 2026; not independently verified outcome evidence.

The small word after a badge names the reporter, from a fixed list: official, filing, platform, company, operator, owner, vendor, independent, association, consultancy, sponsored survey, trade press, press, press release, preprint, abstract, recap. The badge carries the confidence; the word carries the interest. Verified means the primary source said it and we read it in full, never that it was independently tested.

CONTENTS

	Opening: two decisions leave the building	5
1	The landscape entering 2027	7
2	The guest journey: discovery, selection, booking	11
3	AI becomes operational: from assistance to controlled execution	15
4	The evidence: what is already working	21
5	People and organisation	26
6	Platforms and governance	29
7	Emerging developments	31
8	Action agenda by hotel type, and the owner's pages	33
9	The 2027 watchlist	39
10	Closing assessment	41
	Claim check, methods, verification, glossary, sources	42

THE TWELVE TRENDS

Each trend carries a number on a key tag. The tag colour is the action for a full-service hotel; the key cabinet on page 10 gives every trend its action for all three kinds of hotel.

01	Hotel shortlists form inside AI answers, and answers become a paid surface	Ch. 2	07	Staff knowledge assistants	Ch. 5
02	Booking completed inside AI assistants, US first	Ch. 2	08	Food-waste measurement	Ch. 4
03	Voice and messaging agents with bounded autonomy at estate scale	Ch. 3	09	Labour scheduling and overtime analytics	Ch. 4
04	Delegated pricing within guardrails	Ch. 4	10	Control of the property system, data and agent permissions	Ch. 6
05	Group-sales scoring and reporting	Ch. 3	11	Disclosure, liability and security as design inputs	Ch. 6
06	Constrained agents inside property systems	Ch. 3, 6	12	Physical automation, category by category	Ch. 7

FIVE MINUTES

The cover tags, the chapter openers and the key cabinet on page 10.

TWENTY MINUTES

Chapter 1, the authority ladder on page 16, the action agenda in chapter 8 and the owner's pages, 36 to 38.

THE FULL READ

Every chapter, the case files and the claim check, with the sources and the evidence ledger.



OPENING

Two decisions leave the building

On 27 August 2026, Google began rolling out hotel booking in the United States inside AI Mode, its conversational search product. The traveller describes the trip, receives a short list and completes the booking without opening a hotel website.

Ten partners were ready on day one: five online-travel-agency brands and five hotel groups, Choice, Hilton, IHG, Marriott and Wyndham.¹ VERIFIED platform Google said nothing about fees and nothing about how hotels are ranked.

A month earlier, Wyndham had told investors that AI voice agents were “booking those reservations for our hotels completely autonomously” in 1,500 hotels, and that its AI-enabled guest messaging platform was installed in more than 5,000.² QUALIFIED operator

These two facts belong to the same story: the guest’s choice of where to stay, and the hotel’s routine decisions about calls, requests and prices, are both starting to pass to systems the hotel did not build.

Before handing over a decision, an executive normally asks three questions: what does it cost, how often is it wrong, and who has checked it? For both shifts, none of the three has a published answer. NOT FOUND

Two errors are possible: treating deployment as if it proved value, and dismissing a development because its return has not yet been measured. This report tries to avoid both.

*Two kinds of decision are leaving the hotel.
Who decides what the new systems may do?*

OUTSIDE THE HOTEL

The guest's choice

Which hotels a traveller considers and, increasingly, where the booking is completed.

10

launch partners for AI Mode hotel booking VERIFIED platform; no published fee NOT FOUND

Chapters 2 and 6

INSIDE THE HOTEL

The hotel's routine decisions

Answering a call, quoting a rate, logging a request, publishing a price.

1,500

hotels where voice agents book reservations on their own QUALIFIED operator

The operator's own claim, questioned on page 17. Chapters 3, 4 and 5

THE ARGUMENT OF THIS REPORT

In 2027, the hotels that benefit from AI will be the ones that decide deliberately what these systems may do on their behalf, and that measure what actually changes.

That applies on the outside, where AI shapes how guests find and book a hotel. It applies equally on the inside, where AI acts for staff. Adoption surveys and vendor case studies cannot tell a hotel that. Each hotel needs its own answers: what did we switch on, and what changed afterwards?

A hotel already knows how to grade authority. It issues guest keys, floor keys and master keys, and it knows who holds each one. The same grading fits AI, and it runs through this report: chapter 3 sets out the ladder, chapter 8 says which keys each kind of hotel should hand over in 2027. A hotel that holds the keys decides who else gets one.

120

sources cited, each with its reporter named here and its access noted in the source file

10

case files, each with the reliability line the reader most needs

0

sponsors, vendor reviewers or forecast numbers of our own



CHAPTER 1 · THE LANDSCAPE ENTERING 2027

Four changes in 2026

1

Why this matters. AI decisions now arrive through platforms, franchise systems and software a hotel already licenses. Knowing what changed comes first.

WHERE GUESTS CHOOSE

AI answers became a place where hotels are chosen and, in the US, booked

Google's AI Mode composes hotel shortlists and completes bookings with its launch partners.¹ OpenAI sells labelled advertising in ChatGPT across 31 European markets, and Google is testing sponsored units inside AI Mode answers.^{3,4} VERIFIED platform

INSIDE THE HOTEL'S SOFTWARE

AI arrived inside software hotels already own

Oracle made an AI assistant available to OPERA Cloud customers at no extra cost in June 2026.⁵ Apaleo launched an AI Copilot and an interface that lets agents act under defined permissions.⁶ VERIFIED vendor

IN DAILY OPERATION

Bounded autonomy went into production

Wyndham's voice agents take reservations autonomously, by the company's account.² H World says an agent handles over 73% of high-frequency in-stay enquiries in a system available to about 13,000 hotels.⁷ QUALIFIED operator
One revenue vendor says about 55% of its customers use full automation.⁸ QUALIFIED vendor

IN LAW

The rules acquired dates

The EU AI Act has applied generally since 2 August 2026, California's automated-decision rules require compliance by 1 January 2027, and the EU's high-risk rules, which cover employment, start on 2 December 2027.⁹⁻¹¹ VERIFIED official

PLAUSIBLE IN 2027 · OUR JUDGEMENT

The buying question becomes which functions to switch on in systems already licensed. Disclosure and permission settings come with legal dates and belong in the design. No documented case gives an AI open-ended authority over refunds or discounts.

How widely hotels use AI depends entirely on who is asked.

Sponsor-funded surveys of engaged chains report near-universal use. Official statistics for the whole accommodation and food sector put it between about 10% and 21%. Both are correct. They describe different populations with different definitions.^{12–17}

SPONSORED OR SELF-SELECTED SURVEYS

Wyndham owner survey, “begun”

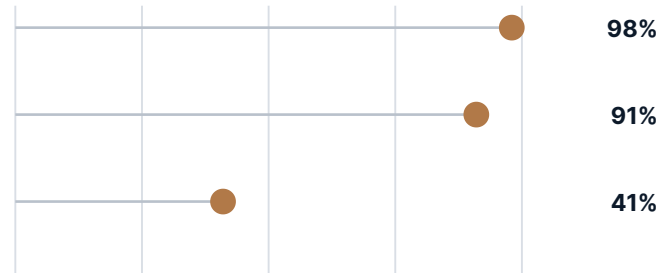
325 owners, non-probability · operator

h2c study, funded by eight vendors

113 participating chains · sponsored survey

HES-SO, six European markets

82% independent, median 31 rooms · independent



OFFICIAL STATISTICS, HOTELS AND RESTAURANTS TOGETHER

UK ONS, June 2026

accommodation and food, 10+ staff

Eurostat, 2025

EU accommodation and food, 10+ staff

US Census, Sept–Oct 2026

accommodation and food, all sizes

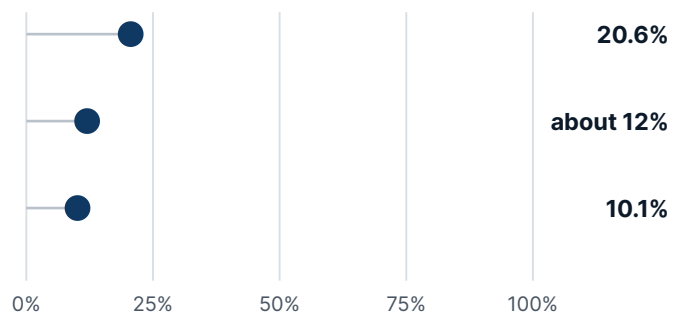


Figure 1.1. Share using AI, as each survey defines it. Six populations: read across, never as a trend. Top to bottom, the three surveys are QUALIFIED operator QUALIFIED sponsored survey VERIFIED independent and the three statistics are VERIFIED official. Official statistics cannot separate hotels from restaurants. In the Wyndham survey, 32% say AI is embedded across most operations. The UK figure is the sum of the two ONS usage categories.

AI use is close to universal among large, engaged hotel companies, shallow in most of them, and far from universal across the sector.

Proof of return is scarce

In the State of Hotel AI survey of 107 hotel-company leaders, 24% said AI had paid for itself and 28% said it was too early to tell.¹⁸ QUALIFIED sponsored survey The survey was led by a marketing lead at a hotel-software vendor (page 23).

Often it is not even measured

A presenter’s recap of the same gated survey says more than a third did not measure AI return at all.¹⁹ LOW CONFIDENCE recap No source isolates how much of AI’s value reaches owners. NOT FOUND

Deployment is outpacing proof, on the outside and the inside.

- 1 **Attention is moving into AI answers faster than bookings are.**
AI-referred visits to US travel sites more than doubled year on year by July 2026, from a base the report does not state. Booking Holdings says language models send it less than 1% of room nights.
- 2 **The two AI answer platforms monetise differently.**
OpenAI places labelled ads, kept separate from the answer. Google tests sponsored units inside the answer. Rules learned on one do not transfer.
- 3 **The autonomy that is spreading is bounded.**
The useful question about any system: what may it do without asking, and what happens when it cannot?
- 4 **Guest conversation has the broadest deployment and the thinnest evidence.**
The design of the handoff to a person decides whether these systems help or harm.
- 5 **Returns hold up first where the starting point can be weighed or metered.**
Food waste, energy and labour hours. Even there, the best-known programme published two results on different baselines, and corrected one figure after questions.
- 6 **Permissions are the decisive infrastructure question.**
Who controls the property system, the data and the rules for agents will shape costs more than the choice of AI model.
- 7 **Emerging capabilities have a 2027 status.**
Computer-use agents have no hotel deployment yet; training simulations are unresolved. Service robots are buyable. Humanoids are not ready.

WHAT TO DO, IN OUTLINE, FOR A FULL-SERVICE HOTEL

The same lines as the full-service column of figure 8.1 on page 35. Independents and multi-property companies differ on several; the key cabinet on page 10 has all three.

● ACT NOW

Presence in AI answers: profiles, rates, policies and measurement. Staff knowledge assistants on approved procedures, under supervision. Contract terms on data and agent permissions. AI disclosure, an inventory of AI uses and security testing.

○ PILOT

Voice and messaging agents with early escalation; paid placement against a comparison period; delegated pricing; one bounded workflow for agents inside the property system; food waste in one kitchen; energy plant control; labour analytics where overtime is material; group-sales scoring after a back-test.

● MONITOR

Booking inside AI assistants, computer-use agents, delivery and cleaning robots.

○ DEFER

Humanoid robots, and any agent authority over refunds, discounts and policy exceptions.

● ACT NOW · INDEPENDENTS ONLY

An after-hours voice agent that knows when to hand over: the one line where the independent moves before the full-service hotel.

Twelve trends, three kinds of hotel, four actions.

	TREND · MATURITY · EVIDENCE	SIGNIFICANCE IN 2027	INDEPENDENT	FULL-SERVICE	MULTI-PROPERTY
01	Hotel shortlists form inside AI answers, and answers become a paid surface Established · Evidence: Traffic data only	High	● ACT NOW profiles, rates, measurement	● ACT NOW paid placement: pilot	● ACT NOW paid placement: pilot by market
02	Booking completed inside AI assistants, US first Early, US only · Evidence: Deployment only	Medium in the US; low elsewhere	● MONITOR	● MONITOR	● MONITOR settle contract questions
03	Voice and messaging agents with bounded autonomy at estate scale Established · Evidence: Operator, undefined metrics	High	● ACT NOW after-hours, overflow	○ PILOT early escalation	● ACT NOW defined metrics
04	Delegated pricing within guardrails Established · Evidence: Non-comparable studies	Medium to high if pricing by hand	○ PILOT if pricing by hand	○ PILOT	● ACT NOW governance; pilot vendors
05	Group-sales scoring and reporting One chain; early elsewhere · Evidence: Operator, no financial figure	Medium for group-heavy hotels	● MONITOR	○ PILOT back-test first	○ PILOT
06	Constrained agents inside property systems Established on open systems · Evidence: Vendor single-property cases	High on open cloud systems	○ PILOT suitable system access, narrow permissions	○ PILOT one bounded workflow	○ PILOT property-level permissions, reviewable logs
07	Staff knowledge assistants Established · Evidence: None in hotels	High where onboarding and repeated training are material	● ACT NOW approved procedures, supervised use	● ACT NOW approved procedures, supervised use	● ACT NOW common policy, staged departmental use
08	Food-waste measurement Established · Evidence: Operator and vendor; one independent study	Medium to high for large F&B	● MONITOR pilot if F&B is large	○ PILOT one kitchen, defined baseline	● ACT NOW portfolio rollout with baselines
09	Labour scheduling and overtime analytics Early · Evidence: Vendor, short window	High where overtime or staffing mismatches are material	○ PILOT material overtime, usable time and payroll data	○ PILOT material overtime or staffing mismatch	○ PILOT comparison properties, payroll measures
10	Control of the property system, data and agent permissions Established · Evidence: Structural	High	● ACT NOW terms when buying	● ACT NOW	● ACT NOW across the portfolio
11	Disclosure, liability and security as design inputs Established · Evidence: Official texts, court decisions	High	● ACT NOW a disclosure line	● ACT NOW	● ACT NOW agent register and testing
12	Physical automation, category by category Established for service robots · Evidence: Vendor cases	Low to medium	○ DEFER	● MONITOR	○ PILOT selectively; humanoids: monitor

Significance and actions are editorial judgement [OUTLOOK](#), consistent with figure 8.1 on page 35. The tag colour in the first column, on the cover and on page 4 is the full-service action. Independent: a resource-constrained independent hotel. Full-service: a full-service or luxury hotel. Multi-property: a hotel company or franchisor. The small line under a key names the condition or the scope. Owners of branded or managed hotels: pages 36 to 38.

2



CHAPTER 2 · THE GUEST JOURNEY



From ten links to a short list

Why this matters. Distribution is one of the largest controllable costs between room revenue and owner profit. If the shortlist forms in a system you do not control, that system's rules will set your cost of being chosen.

For two decades hotels learned the rules of online distribution: rank in search, list on the agencies and pay their commission, bid on metasearch. AI answers change the unit of competition. A system composes a short list from the hotel's profile, agency content and reviews, and explains it.

Visits are growing

Adobe data, reported by trade press, show AI-referred visits to US travel sites up 119% year on year in July 2026, from an unstated base. The conversion gap of those visitors narrowed from 28% below other visitors to 1%

below.²⁰ LOW CONFIDENCE trade press In one vendor's data AI referrals were just under 1% of hotel website visits.²¹ LOW CONFIDENCE vendor

Bookings are not following yet

Booking Holdings' finance chief said on 4 August 2026 that traffic from language models, paid and unpaid, was "still significantly below 1%" of room nights.²² QUALIFIED company SiteMinder client data, relayed by a consultancy, show hotels' direct revenue share within 1.5 points of the previous year in 95% of markets.²³ LOW CONFIDENCE consultancy In a YouGov survey for Expedia, 66% said they would not trust AI to book on their behalf.²⁴ QUALIFIED sponsored survey

<1%

of Booking Holdings' room nights come from language-model traffic

QUALIFIED company

66%

of travellers surveyed for Expedia would not trust AI to book on their behalf

QUALIFIED sponsored survey

The shortlist has moved before the bookings have.

For most hotels in 2027, AI's commercial effect will come through consideration: whether the hotel appears, how it is described and what price appears beside it.

AI answers concentrate attention, and they can be wrong.

Americas Great Resorts, a luxury-hotel marketing firm that also sells AI-visibility audits, captured 180 answers from ChatGPT, Google AI Mode and Gemini across six US luxury markets on 29 July 2026.²⁵ QUALIFIED vendor The publisher warns that one day's capture does not establish market share.

824

recommendation slots in one day's capture

QUALIFIED vendor

23

properties took half of them

QUALIFIED vendor

5

times a hotel demolished 108 days earlier was recommended

QUALIFIED vendor

Positions are not fixed

A consultancy study of repeated hotel queries found the same hotel ranked first in about half of identical runs on average, anywhere from 17% to 96% depending on the market.²⁶ QUALIFIED consultancy

Agency content dominates the sources

In one vendor analysis hotel-owned websites appeared in about 6% of AI responses.²⁷ A July 2025 study of 145 well-recommended hotels found agencies the most cited source.²⁸ QUALIFIED vendor

What does not help

A controlled test of 1,885 pages, not hotel-specific, found no meaningful lift in AI citations from structured-data markup.²⁹ QUALIFIED vendor

The Invisible Shortlist (Cross-Point, September 2026) treats this distribution shift in depth for owners in Europe and the GCC. It is at giacometti-consulting.com.

THREE PRACTICAL POINTS OUTLOOK

1

The inputs AI systems read are ones hotels already manage.

Business profiles, rates, policies, photos, reviews and agency listings. Errors in those inputs now travel further.

2

A hotel's position must be measured repeatedly.

The same hotel ranked first in about half of identical runs. One check tells you little.

3

Agency listings are part of the hotel's AI presence.

Agency and metasearch content dominates the sources AI draws on. Treat those listings as yours.

ChatGPT sells attention outside the answer.

Google can sell a unit inside it.

	OPENAI (CHATGPT)	GOOGLE (AI MODE)
Where the paid unit sits	Labelled and “separate” from the answer ³⁰	Inside the answer, labelled “Sponsored”, in testing ⁴
Platform’s statement on influence	Ads “do not influence” answers (OpenAI’s own statement, untested)	No equivalent statement found
Availability	31 European markets, self-serve since 31 August 2026; ³ Ads Manager list includes six Gulf states ³¹	US first; no country list published
Booking inside the product	No native hotel checkout confirmed	Hotel booking live in the US, in English, since 27 August 2026 ¹
Hotel-specific terms or fees	None published NOT FOUND	None published NOT FOUND

Figure 2.1. Platform statements as of 9 October 2026. **VERIFIED** platform

Why the distinction matters

On ChatGPT, whether the hotel appears inside the answer is still an organic outcome. On Google, a sponsored unit can sit among the recommendations themselves. No primary source shows paid placement changing organic hotel recommendations. **NOT FOUND** Any hotel testing paid AI placement should measure exactly that, by keeping a comparison market or period without spend.

Google is changing other things around the listing

Trade press reports that AI Mode can show a loyalty-points price beside the cash rate for Choice, Hilton and Wyndham.³² **LOW CONFIDENCE** trade press
Third-party rates in Google hotel ads became unavailable after
30 September 2026.³³ **VERIFIED** platform
On 23 July 2026 the European Commission fined Google €460 million for favouring its own services in Search, hotels among them, part of €890 million across two decisions.³⁴ **VERIFIED** official

Google AI Mode hotel booking

VERIFIED platform

WHO	Google, in the United States, with five agency brands and five hotel groups as launch partners.
WHAT THE AI DOES	Composes a shortlist from the conversation and completes the booking through partner connections. The hotel or booking platform remains merchant of record, the party that takes payment and holds the contract with the guest.
REPORTED OUTCOMES	None published: no volumes, fees or ranking rules.
HOW RELIABLE	<i>A platform statement about its own launch, with no outcomes to assess.</i>
LESSON	The first live AI checkout for hotels launched with the largest chains and agencies; independents reach it, if at all, through intermediaries. Ask booking-engine and channel partners how such bookings would route to you, and at what cost.

Sources 1, 35

Three scenarios for 2027. No credible numerical forecast exists.

The projections in circulation measure referral traffic, AI-facilitated spending or consumer interest, or disclose no method.^{36,37} We give scenarios with signals in place of numbers. [OUTLOOK](#)

A

THE LIKELY STARTING POINT

Referral-led

AI answers shape the shortlist; completed in-assistant bookings stay immaterial outside a few chains.

SIGNALS

Booking and Expedia keep describing AI volume as small; Google publishes no fee.

B

PARTLY UNDER WAY IN THE US

US checkout-led

AI Mode booking produces measurable volume, concentrated among launch-partner chains and agencies in the US.

SIGNALS

Partner disclosures of completed AI Mode bookings; a published Google fee.

C

UNANNOUNCED SO FAR

Wider rollout

Checkout extends beyond the US and to more merchants, including independents through booking engines.

SIGNALS

A launch outside the US; general availability of Google's lodging booking protocol.³⁸

The fee question

Hilton's annual report for 2025 warns that "the entry of major technology platforms, such as large language models, into the internet travel bookings business, also could divert bookings away from our direct channels and increase our hotels' cost of sales".³⁹ [VERIFIED](#) filing

Trade press describes three possible commission models for AI-agent bookings, none adopted: a per-booking fee, a subscription, a performance fee.³² [LOW CONFIDENCE](#) trade press

Until fees are published, the cost of a booking made through an AI answer is unknown. For 2027 distribution planning it is the most consequential missing number. [NOT FOUND](#)

For a hotel in Europe or the Gulf, the near-term exposure is visibility and paid placement. Checkout comes later. The signals in scenario C would move it forward; none has appeared.

0

published fee schedules for AI-agent hotel bookings

[NOT FOUND](#)

3

commission models described in trade press, none adopted

[LOW CONFIDENCE](#) trade press

2

platforms, two different business models

[VERIFIED](#) platform



From assistance to controlled execution

Why this matters. The systems now being deployed do things. Two questions belong to management: what may each system do, and what happens when it is wrong? Where hotels leave them open, vendor defaults answer them.

Four kinds of “AI”

Much confusion comes from using one word for four different things.

TYPE	WHAT IT DOES	HOTEL EXAMPLES	IN HOTELS SINCE
Rules-based automation	Follows fixed instructions	Room-assignment rules, scheduled emails	Decades
Predictive AI	Forecasts or scores from history	Demand forecasts, price recommendations, lead scoring	2000s
Generative assistance	Drafts, summarises, translates for a person to use	Review replies, procedure look-up, multilingual messages	2023
Agents	Carries out tasks in other systems, within permissions	Taking a reservation, creating a work order, publishing a price	2025 to 2026

Constrained agents inside property systems, trend 06, are AI systems that carry out specified tasks in the hotel’s operating software, such as creating a maintenance request or updating an authorised field. Their access, permitted actions and escalation rules are defined in advance. An assistant retrieves information; an agent may also change a record.

A wrong forecast

costs an opportunity.

A wrong draft

is caught before it is sent.

A wrong agent

has already acted.

Autonomy is a set of keys.

The master key is the one hotels handed over in 2026.

“Is it autonomous?” is the wrong question, because authority comes in grades. A hotel already grades it by key, and the same grading fits AI: classify a system by what it may do without asking, and by what happens when it cannot. Every hotel-side case file in this report carries its rung: its step on this ladder, from advise to open-ended.

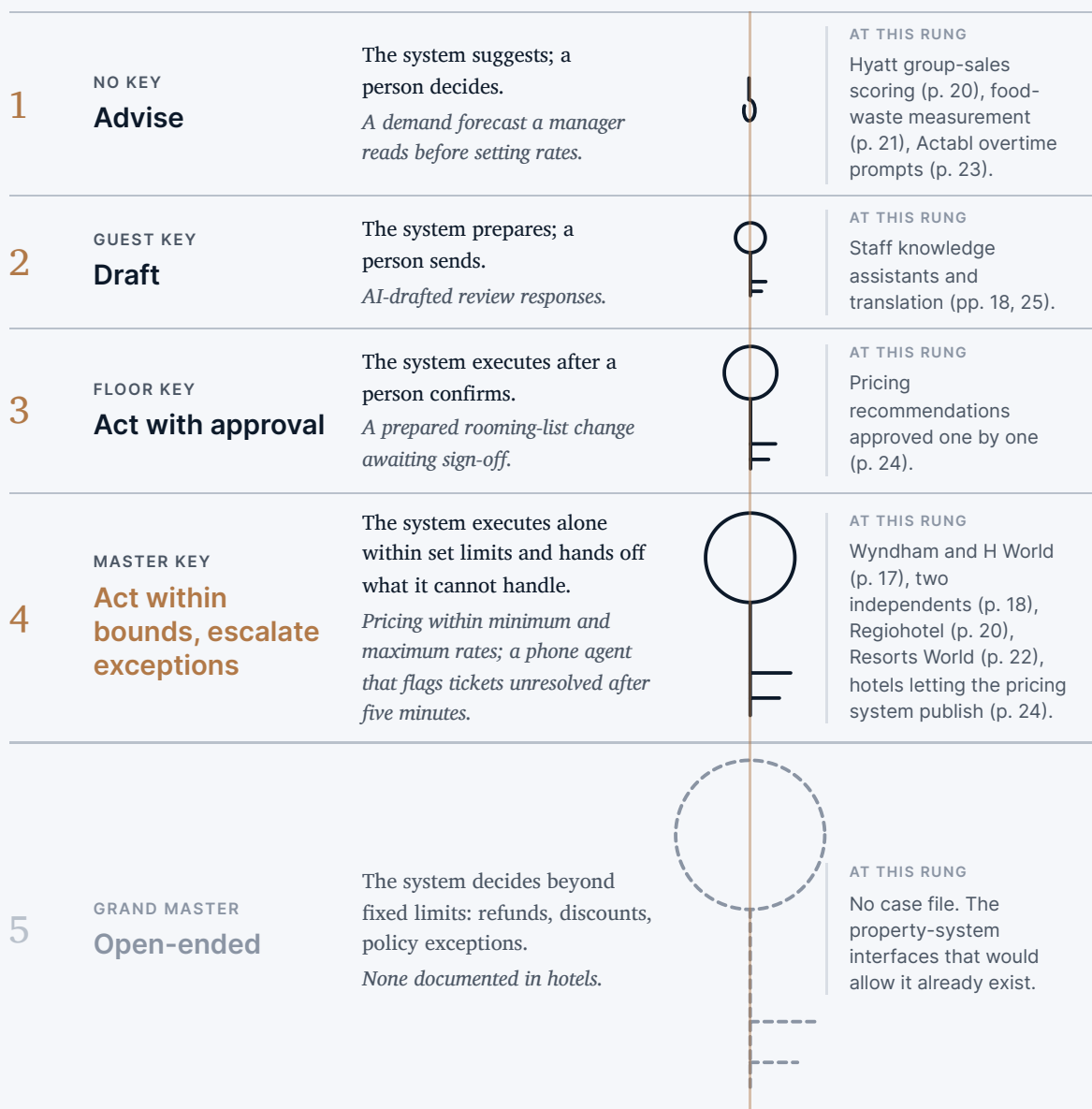


Figure 3.1. Classification framework **OUTLOOK**. No grand master was found in the sources, yet property-system interfaces already expose rate changes, voided charges and payment posting to permitted software, by vendor documentation and a third-party directory.^{40,41} **QUALIFIED** vendor The barrier is a permission setting; who controls it is the governance question for 2027. To classify a system, ask what it may do without asking a person; what happens when it cannot; and who set the limit, where it is written, and who can change it.

Broadest deployment, thinnest evidence.

Phone calls, messages, in-stay requests and translation: guest communication is where hotel AI has spread furthest, and the clearest test of whether deployment means value. Two case files from the largest estates here; two independents on the next page.

Wyndham · voice and messaging across a franchise estate



RUNG 4 · MASTER KEY QUALIFIED operator

WHO	Franchisor of mainly economy and midscale brands, tackling unanswered calls and messages at lean franchised hotels.
WHAT THE AI DOES	An AI-enabled guest messaging platform, Wyndham Connect, in more than 5,000 hotels, about 260,000 interactions a day. Voice agents in 1,500 hotels booking “completely autonomously”.
REPORTED OUTCOMES	A 15% higher average daily rate when booked autonomously than by phone; “0 drop calls”; “500 basis points of direct contribution” (undefined); “\$100,000 or more” for “engaged franchisees” from upselling.
HOW RELIABLE	<i>The rate comparison may reflect who calls. “Direct contribution” is undefined and absent from the results release. “Engaged franchisees” is a selected group. Wyndham sells the premium tier.</i>
LESSON	The broadest guest-facing AI deployment we found in Western hotels comes with undefined metrics. Ask how each metric is defined, what share of calls is resolved, transferred or abandoned, and what the agent may change.

Sources 2, 42, 43

H World (Huazhu) · an in-stay service agent in China



RUNG 4 · MASTER KEY QUALIFIED operator

WHO	H World, about 13,000 hotels in China; Tencent Cloud as vendor.
WHAT THE AI DOES	Answers guest enquiries and creates tasks through 38 workflows linked to property, customer and work-order systems. Staff handle physical service and exceptions.
REPORTED OUTCOMES	More than 73% of high-frequency enquiries handled automatically; accuracy above 95%; a test set grown from about 200 to more than 2,000 questions.
HOW RELIABLE	<i>Coverage of about 13,000 hotels is not usage. Accuracy is undefined. Satisfaction, labour and cost effects are not disclosed.</i>
LESSON	Copy the testing discipline: a growing, scored set of real guest questions, run before and during deployment.

Sources 7, 44

27%

of callers who engaged with a voice agent asked for a person. About three-quarters of calls needed no transfer.⁴⁵

QUALIFIED vendor

92.2%

of 308 human-handled calls to luxury and upscale hotels did not capture the caller's contact details.⁴⁶

LOW CONFIDENCE vendor

9 of 9

touchpoints where most of 3,250 travellers preferred a person; at the hotel bar 72%, at the welcome on arrival 66%.⁴⁷

QUALIFIED vendor

Most routine contacts need no transfer. Those who want a person decide the result.

Messaging results are similar in kind to the voice cases. A Gold Coast resort attributes 531 bookings worth more than AUD 750,000 in under six months to a messaging assistant, with no baseline.⁴⁸ QUALIFIED vendor Motel One's chatbot vendor reports about 20,000 guests using it in a month, which measures use.⁴⁹ QUALIFIED vendor Wyndham's upselling claim is the only ancillary-revenue figure we found.

Two independents · Auckland and Maine



RUNG 4 · MASTER KEY

QUALIFIED vendorLOW CONFIDENCE owner

WHO	An anonymised 40-room Auckland boutique hotel whose after-hours calls went to voicemail; the 24-room Foreside Inn, Maine, which runs without a staffed front desk.
WHAT THE AI DOES	Auckland: an AI voice line answers after-hours calls and takes bookings. Foreside: guest contact runs through a remote concierge service; the source does not say how much of it is automated.
REPORTED OUTCOMES	Auckland: 39 bookings from the AI line in the first month against 8 from voicemail callbacks, at the vendor's quoted USD 0.80 a minute. Foreside: the owner projects about USD 200,000 a year from running without a desk.
HOW RELIABLE	<i>One anonymised month on different denominators; a projection for a deskless model, not for an AI system. The Foreside owner doubted the model would work at 100 rooms.</i>
LESSON	After-hours calls are the cleanest first test for a small hotel: the alternative is voicemail, the risk is low and the cost per minute is known.

Sources 50, 51

A peer-reviewed study of 340 UK users of hotel-booking chatbots found inaccuracy produced the strongest negative reaction, and telling users they were dealing with AI had mixed effects, according to the university's press release.^{52,53} LOW CONFIDENCE press release

Taken together with the figures on the previous page: most routine contacts can be answered without a transfer, a substantial minority of guests want a person and should reach one quickly, and many human-handled calls go badly too.

Multilingual service: low risk, little measurement

Translation is the least contested use of generative AI in hotels, and among the least measured. OPERA Cloud's assistant includes it,⁵ housekeeping task tools advertise hundreds of languages,⁵⁴ Four Seasons Kuala Lumpur offers AI interpretation for events.⁵⁵ QUALIFIED vendor None publishes accuracy data. Allergens, medical needs and safety procedures still need a human check.

Hilton assists blind and low-vision guests through the Be My Eyes app, with trained agents at the centre.⁵⁶ No hotel testing of chatbots with deaf or screen-reader users was found. NOT FOUND

Hand over before frustration builds. A takeover after it rescues little.

The strongest causal evidence on handoff comes from outside hotels: a randomised field experiment on the Taobao platform, with 647 service workers and 680,676 text chats.⁵⁷ **QUALIFIED** preprint AI handling shortened chats but lowered ratings, and earlier intervention by a person helped.

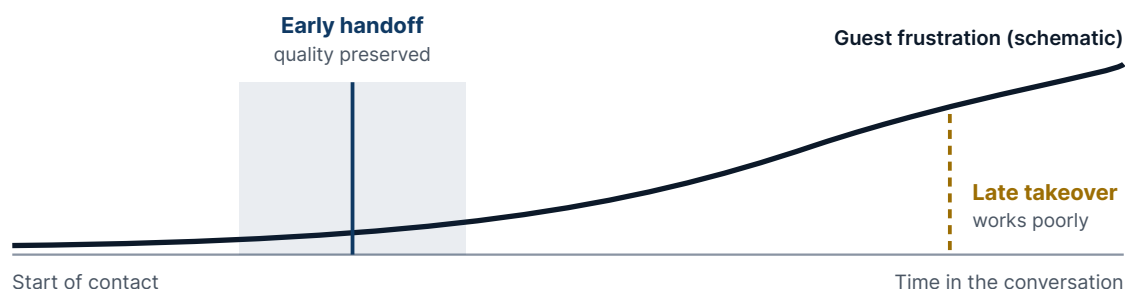


Figure 3.2. Schematic of the mechanism, not a plotted series. E-commerce, not hotels; one author works for Alibaba.

GOOD HANDOFF DESIGN **OUTLOOK**

1. Escalate early on signs of frustration, as well as on failure to understand.
2. Pass the conversation history so the guest does not repeat it.
3. Take prices and policies from hotel systems, never from the model's general knowledge.
4. Count wrong answers as well as the share of contacts resolved without transfer.

Twilio is reported to have found that 70% of Asia-Pacific consumers it surveyed abandon AI interactions when context is lost.⁵⁸ **LOW CONFIDENCE** recap

The law points the same way

In 2024 a Canadian tribunal held Air Canada responsible for its chatbot's inaccurate bereavement-fare answer, and called Air Canada's suggestion that its chatbot was a separate legal entity "a remarkable submission".⁵⁹ **VERIFIED** official

In May 2026, in a decision now under appeal, a German higher regional court treated a company's chatbot statements as the company's own.⁶⁰ **VERIFIED** official

When a platform speaks, the risk is reputational: a consumer investigation found AI review summaries describing hotels with serious complaints in positive terms.⁶¹ **LOW CONFIDENCE** press



RICCARDO'S VIEW

Compare AI with the service guests actually receive

When an owner tells me that AI cannot match their service, I want to examine the service guests actually receive. Who answers when reservations is closed? How long does a reply take? Does it resolve the question?

I would compare AI with that experience, while using the hotel's best human service as the quality target. Slow, incomplete or rude human replies belong in the comparison.

Guests should be able to choose how they contact the hotel and reach a person when they need one. The hotel decides what the system may promise or do, and remains responsible for the service delivered.

In 2027 many hotels will have agent features without buying anything new. [OUTLOOK](#)

Regiohotel and THE FLAG · agents in an open property system

KEY RUNG 4 · MASTER KEY [QUALIFIED](#) vendor

WHO	Two European independents on Apaleo's property system: Regiohotel in Germany, covering its phones; THE FLAG Zürich (101 rooms), turning guest comments into housekeeping and maintenance tasks.
WHAT THE AI DOES	A phone agent works through narrowly scoped interfaces; unresolved tickets are flagged after five minutes and unanswered questions join the knowledge base next day. A task agent creates about 30 tasks a day.
REPORTED OUTCOMES	Regiohotel: agent-handled bookings "around 8%" of business and about 30% of phone business. THE FLAG: about 3.5 staff hours a week saved.
HOW RELIABLE	<i>Vendor case studies; denominators, costs and periods not disclosed.</i>
LESSON	The control design is what transfers: narrow permissions, a time limit before escalation and a daily review of what the agent could not answer. Both relied on an open interface.

Sources 62–64

Hyatt · scoring key and valuing group business

KEY RUNG 1 · NO KEY [QUALIFIED](#) operator

WHO	Chain-wide. Its chief executive cites "more than one and a half million RFPs we get every year from corporate customers".
WHAT THE AI DOES	Scores and values incoming group requests so that salespeople work the most promising first.
REPORTED OUTCOMES	About 20% higher sales productivity, as summarised by the press; "a full day a week per salesperson"; no financial figure.
HOW RELIABLE	<i>Productivity measure undefined; no financial figure.</i>
LESSON	Lead scoring can be back-tested on last year's requests before anyone relies on it. Commentators warn AI-drafted proposals can make bids look alike. ⁶⁵

Sources 66–68

The same capabilities are becoming standard features. Apaleo's Copilot launched in March 2026 and Oracle's assistant in June, with no outcome data yet.^{5,6} Phone-photo room inspection tools are on sale with only vendor trial claims behind them.⁶⁹ [QUALIFIED](#) vendor

The back office lags. One supplier says its tool can automate "up to 95 percent" of invoice-processing tasks, a capability claim.⁷⁰ We found no measured hotel outcome for AI in accounts payable, night audit, procurement or predictive maintenance. [NOT FOUND](#)

PLAUSIBLE IN 2027 · OUR JUDGEMENT

Guest-facing agents spread further through franchise systems and property-system vendors.	The commercial argument moves from deployment counts to metric definitions: resolution, transfer, abandonment and wrong-answer rates.	The first EU disclosure requirements shape scripts.
---	---	---

WHERE THIS LEADS · THE AUTHOR'S JUDGEMENT Guest-facing AI and internal workflows are likely to connect: a guest conversation may lead directly to an authorised task for the team. The test is whether the request reaches the right person or system, is completed correctly and leaves a record someone can check. [OUTLOOK](#)

4



CHAPTER 4 · THE EVIDENCE



Where the baseline is physical, measurement is easier

Why this matters. Budgets are approved on evidence of return, and the difference between a measured and a claimed return usually lies in the baseline.

Food-waste measurement · three hotel groups

	 RUNG 1 · NO KEY	<u>QUALIFIED</u> operator	<u>QUALIFIED</u> vendor
WHO		Mandarin Oriental, four hotels over six months; Marriott's 53 managed hotels in the UK, Ireland and the Nordics; Hyatt Regency Aqaba Ayla, Jordan.	
WHAT THE AI DOES		Cameras and scales identify and weigh discarded food; chefs change production, top-ups and purchasing.	
REPORTED OUTCOMES		Mandarin Oriental 36% over six months. Marriott 25% in the first half of 2024. Aqaba 39% over just over a year: 13,133 kg and €131,082 saved.	
HOW RELIABLE		<i>Baselines and definitions not published. Mandarin Oriental and Marriott use the same vendor and do not corroborate each other.</i>	
LESSON		The direction is consistent; the size is not. Savings come from what chefs do with the data as much as from the cameras.	

Sources 71–73

What independent evidence adds

A five-site European study, independent of any seller, found reductions of 23% to 51% at four sites, and a 13% increase at a Swiss hotel.⁷⁴ LOW CONFIDENCE abstract Staff-recorded tracking under-recorded waste by about 30% at one hotel breakfast buffet.⁷⁵ VERIFIED independent Reductions measured on staff-recorded data deserve a discount.

The most useful benchmark predates AI. A 2018 analysis of 42 hotel sites found measuring and acting on food waste returned a median of about five times its cost over three years, and more than 70% of sites recouped the investment within a year.⁷⁶ VERIFIED independent Much of the return may come from measurement and attention.

CASE FILE · RESULTS EXPLAINED BY THE VENDOR

Green Ramadan: two sets of results, two baselines

RUNG 1 · NO KEY QUALIFIED operator QUALIFIED vendor

Hilton with Winnow addressed buffet waste during Ramadan at 45 hotels in 14 countries, which applied to take part, and at breakfast in 13 UAE hotels, a programme called Green Breakfast. Vision-based waste tracking, daily reviews, coaching, live cooking stations in place of buffets, smaller portions and prompts to guests.

	HILTON RESULTS RELEASE, 2025	AWARD RELEASE, JANUARY 2026
Period	The 2025 campaign	All campaigns since launch in 2023
Baseline	Week 1 of 2025: 87 g per cover	2023, per cover
Plate-waste reduction	26% (87 g to 64 g per cover, week 1 against week 4)	more than 80% per cover
Meals saved	6,376	18,900
CO2e avoided	10.9 t	32.4 t
Source	Hilton EMEA, results release ⁷⁷	Hilton EMEA, award release ⁷⁸

How the two fit, in Winnow’s reply to the author (page 43): the results release covers the 2025 campaign against a 2025 baseline; the award release adds up every campaign since 2023 against the 2023 baseline. The results release first gave the starting point as 102 g, the end of the 2024 campaign. After the request, Hilton amended it to 87 g, which makes the 26% consistent; the release keeps its date of 30 May 2025 and carries no note of the change (checked 16 October 2026). Green Breakfast’s 400,000 meals is an annualised projection.⁷⁹

HOW RELIABLE

Two operator releases on different baselines, explained by the vendor whose system produced the measurements; one figure since corrected. Hotel-level data are unpublished, and Hilton has not commented.

This is one of the most visible AI sustainability programmes in the industry. The two releases answer different questions: what the 2025 campaign achieved, and what the programme has achieved since 2023. The lesson for any hotel is to state the baseline beside every number. The request and Winnow’s answers are on page 43.

ENERGY · NEWER, VENDOR-REPORTED, AND TESTABLE AGAINST METERED DATA

Resorts World Las Vegas · chilled-water plant control

RUNG 4 · MASTER KEY QUALIFIED vendor

WHO	A casino resort of more than 3,500 rooms, using Johnson Controls software to adjust cooling-plant set points every 15 minutes without replacing equipment.
WHAT THE AI DOES	Resets the plant’s set points on its own within the operating limits engineers have set.
REPORTED OUTCOMES	10.2% less energy in the chilled-water plant; USD 110,000 a year; a USD 88,000 utility incentive.
HOW RELIABLE	<i>Plant only, not the whole building; no baseline period; the release also credits staffing changes.</i>
LESSON	Large plants with modern controls can test this against metered data, so the result can be verified on site.

Sources 80

The clearest outcomes come from the narrowest deployments.

USE	DEPLOYED	SHOWN TO WORK	STRONGEST OUTCOME SOURCE
Food-waste measurement	● ● ●	● ● ●	Operator; one independent study (abstract)
Energy plant control	● ● ●	● ● ●	Vendor
Labour and overtime analytics	● ● ●	● ● ●	Vendor
Delegated pricing	● ● ●	● ● ●	One academic pilot (abstract); vendor
Voice and messaging agents	● ● ●	● ● ●	Operator, undefined metrics
Group-sales scoring	● ● ●	● ● ●	Operator, no financial figure
Staff knowledge assistants	● ● ●	● ● ●	Outside hotels only
Back-office finance and procurement	● ● ●	● ● ●	Capability claims only

Figure 4.1. Editorial grading **OUTLOOK** on four steps: none, some, moderate, strong. Deployment counts breadth across the industry; outcome counts the strength of the best available evidence. Based on chapters 3 to 5.

Guest-facing agents: everywhere, poorly measured. Food-waste systems: narrower, and measured.

Judge each use on two questions: what has it measurably changed, and does it matter enough to test before its return is proven?

PLAUSIBLE IN 2027 · OUR JUDGEMENT

- Food-waste measurement keeps spreading through full-service and resort portfolios.
- Pressure grows for consistent per-cover reporting.
- Energy and labour tools produce their first full-season results.

Actabl AI Insights beta · overtime at 100-plus hotels

RUNG 1 · NO KEY **QUALIFIED** vendor

WHO	More than 100 hotels across eight management companies, including Concord Hospitality.
WHAT THE AI DOES	Flags overtime risk to managers, who decide what to change; a Concord executive calls it a “coaching tool”.
REPORTED OUTCOMES	Overtime share of hours down 13% on average, against flat or rising overtime at the same companies’ other hotels, over two to three months.
HOW RELIABLE	Vendor data; short summer window; baseline levels and payroll effects not given.
LESSON	Comparing against the same companies’ other hotels is a better design than most. A full season and payroll figures come next.
DISCLOSURE	The State of Hotel AI survey cited on pages 8 and 26 was led by a marketing lead at Actabl, the vendor of this beta. ¹⁸ The two are reported separately here.

Sources 81

Delegation is real. Its effect size is unknown.

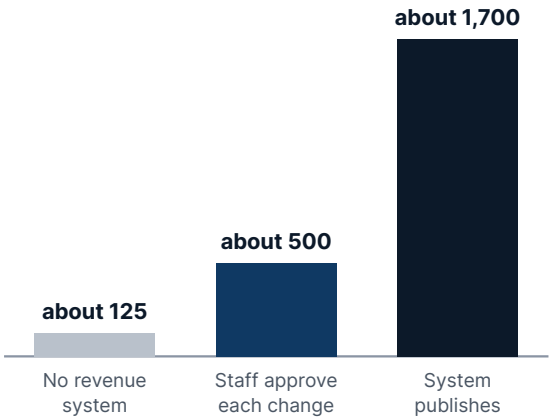


Figure 4.2. Price changes a month in one vendor's hotel data.⁸ QUALIFIED vendor

Revenue management is where hotels have used predictive AI longest. What changed in 2026 is how much is delegated. In one vendor's data, comparable hotels without a revenue system changed prices about 125 times a month; hotels approving recommendations, about 500; hotels letting the system publish, about 1,700.

How much that is worth is not established. The published results do not share a measure, a design or a sponsor.

Hotels already on a revenue system will see a smaller increment than hotels that price by hand. OUTLOOK No independent full evaluation of delegated pricing was found. NOT FOUND

Two US appellate courts have reached opposite conclusions at the pleading stage on whether hotels using the same pricing software can be accused of price-fixing, so the terms of the system, whether competitors' data are pooled and whether recommended prices must be followed, are a diligence matter.^{82,83} VERIFIED official

STUDY	MEASURE	DESIGN	WHO RAN IT	RESULT
Ji et al. (2023)	RevPAR (revenue per available room), budget-chain pilot	Against a statistically constructed control group	University team	+11.8% <u>LOW CONFIDENCE</u> abstract
Mews (2026)	Revenue per square metre	Hotels on automation 9+ months against matched hotels without a revenue system; a subgroup chosen after the all-user comparison	Vendor	+13% over 18 months <u>QUALIFIED</u> vendor
Lighthouse	RevPAR	Control group not stated	Vendor	+21% <u>LOW CONFIDENCE</u> vendor

Figure 4.3. Three studies, three measures, three baselines, so they are set as a table, never as a range.^{8,84,85}

TEST DELEGATION, NOT ALGORITHMS

Agree the index first

A competitive-set index, chosen before the pilot, is the measure.

Set the guardrails

Minimum and maximum rates, and who may change them.

Compare like seasons

Review across comparable seasons, with the hotels that still price by hand as the reference.

Labour: decide in time, count in currency.

Trend 09 is a pilot for all three kinds of hotel where overtime or staffing mismatches are material. The daily review it supports is a management practice any hotel can adopt now. The Actabl case on page 23 is the only outcome evidence, from the vendor, over a short window.

ACT NOW · THE PRACTICE

A daily overtime review by the shift leader, two to three hours before the shift ends.

PILOT · THE TOOL

AI analytics that prompt the review and flag exceptions, where overtime or staffing mismatches are material.



RICCARDO'S VIEW

Review overtime while there is still time to change it

I see this first as a way to use the team already employed more effectively and avoid unnecessary overtime. Two to three hours before a shift ends, the shift leader should review what work remains, what service coverage must stay and whose additional hours can be avoided.

AI can prompt that review and flag exceptions; the manager makes the decision with the team's skills and constraints in mind. I want overtime shown in currency, alongside hours, and its effect reconciled to the hotel's operating result. A dashboard earns its place when it changes a decision in time.

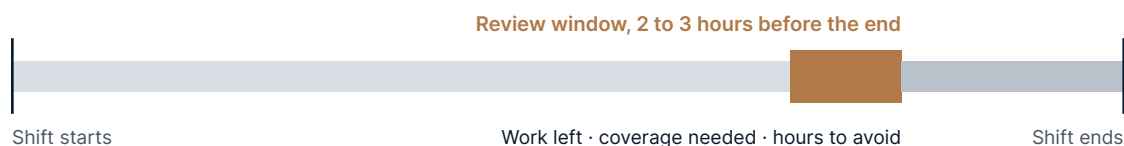


Figure 4.4. The daily review, schematic. The shift length is illustrative.

THREE RESULTS TO REPORT SEPARATELY

RESULT 1

Overtime hours

Hours above contract, by department and shift. The first sign that the daily review works.

RESULT 2

Payable cost

A financial saving counts where a payable cost, or a properly valued accrued obligation, falls. Finance reconciles it to payroll and to gross operating profit (GOP), after tool and implementation costs.

RESULT 3

Released capacity

Hours freed for guest-facing or other work. Report them on their own, and check whether the work has moved into another shift.

ASK FIRST

Would a daily exception report and a reliable management routine solve this adequately without an AI system? The difference is the value AI adds.

A proposed measurement discipline, for finance and an employment adviser to confirm under local law and practice. It concerns overtime and the team already employed; headcount is outside it.



Access is not use

Why this matters. Labour is one of the largest costs in most hotels, and the people who run them decide whether a tool is used or quietly ignored.

Large hotel companies have given staff AI tools at scale. Hyatt rolled out ChatGPT Enterprise to corporate and hotel staff.⁸⁶ Choice launched CHARLIE, an AI coach for franchise hotel staff, in May 2026; it reminds users they are “responsible for independently reviewing and verifying all AI-generated content”.^{87,88} VERIFIED company None has published usage or accuracy figures.

Evidence from outside hotels is a warning. In a large randomised study of Microsoft 365 Copilot, the median worker given the tool used it in 39% of weeks, and 20% never used it in months four to six.⁸⁹ QUALIFIED vendor

Where productivity gains are likely

A study of 5,172 customer-support agents found AI assistance raised issues resolved per hour by 15% on average and by about 30% for the least experienced; the best performers gained little and showed small quality declines.⁹⁰ VERIFIED independent If that holds in hotels, the largest gains come in high-turnover roles: front desk, reservations, call centres, where getting new hires competent faster is worth more than speeding up veterans.

No hotel-specific outcome study was found; the productivity evidence above comes from outside hotels. NOT FOUND The author’s view, and the scope of Act now for staff knowledge, follow on the next page.

39%

of weeks the median worker used the assistant they were given

QUALIFIED vendor

+30%

issues resolved per hour for the least experienced support agents

VERIFIED independent

WHAT LEADERS SAY HOLDS THEM BACK

Change management	35%
Data quality	34%
Systems integration	29%

107 hotel-company leaders, in a survey led by a vendor’s marketing lead (page 23).¹⁸ QUALIFIED sponsored survey

Act now on staff knowledge, within a written scope.

Trend 07 is Act now for all three kinds of hotel. Its evidence is unchanged by that: the productivity studies on the previous page come from outside hotels, and no hotel-specific outcome study was found. The recommendation rests on judgement and on a narrow scope, and the badges are unchanged.



RICCARDO'S VIEW

Make useful knowledge available when staff need it

I would act now on a narrowly scoped staff knowledge assistant, especially where seasonal staff need repeated training. Start with one department's approved, current procedures and the questions its team answers repeatedly. Give someone responsibility for the source material and check the assistant against real questions before staff rely on it.

It should show where an answer comes from and hand uncertain questions to a person. Practical instruction and experienced colleagues stay at the centre; the assistant makes routine knowledge easier to find and gives the team a more consistent starting point. Measure whether people get the right answer faster, and whether checking and correction consume the time saved.

THE SCOPE OF ACT NOW

In scope now

- Routine, read-only lookup of approved, current material
- One department first, with the questions its team answers repeatedly
- A named owner for the sources
- Answers checked against real questions before staff rely on them

Continue when

- The sources have an owner
- Answers reach the agreed quality
- The time saved survives checking and correction

Pause or restrict when

- Sources go out of date
- Answers cannot be trusted

Outside this scope: safety-critical guidance, decisions about employees, and open access to staff and guest records. Broader automation needs a decision of its own.

WHAT TO MEASURE

MEASURE 1

Time to the right answer

How quickly staff find a correct answer, against the old way.

MEASURE 2

Checking and correction

The time spent verifying and fixing answers, counted against the time saved.

MEASURE 3

Time to competence

How quickly new and seasonal hires handle the department's routine questions on their own.

Brands describe benefits to owners. None isolates AI's share.

Data and integration are the real constraints

Boutique-hotel members of a US lodging association named integration their top pain point; “no one reported transformative results yet”.⁹¹ QUALIFIED association Wyndham’s voice agents draw on Salesforce customer records and Minor Hotels has promised a guest data platform within 2026; neither has reported results.^{2,92} For most hotels the starting point is duller and more valuable: one clean guest profile, consistent rate and policy data, and a property system that lets authorised tools read them.

Documented job changes are modest, and mostly above the property

Mews, a hotel-software company, cut about 15% of its 1,350 staff in a move to become “AI-native”, largely sparing customer-facing roles.⁹³ LOW CONFIDENCE trade press We found no property-level reduction in frontline jobs attributed to AI. NOT FOUND Expedia’s 2026 layoff notices were not attributed to AI by the company.⁹⁴ Inside hotels, the reported change is in where time goes: Hyatt’s salespeople prioritise scored leads, managers in the Actabl beta act on overtime prompts.

What the brands say to owners

Hilton’s chief executive estimated 75 to 100 basis points (0.75 to 1 percentage point) of owner margin from a bundle of loyalty-fee changes, procurement savings and “process, AI”.⁹⁵ Accor’s chief executive put owners’ cost reductions at “likely 15%–30% over the next 12–18 months”, forecast or target not stated.⁹⁶ QUALIFIED operator DiamondRock, a hotel owner, is “doing a lot with AI in order to find labor efficiency” at its own properties.⁹⁷ QUALIFIED owner The owner’s page (page 36) takes this up.

Labour relations are constraints to respect

Reported terms of the 2023 Las Vegas Culinary Union agreements include notice of new technology, training, severance and bargaining over tracking technology.⁹⁸ LOW CONFIDENCE press In Germany a labour court found no co-determination right over browser-based ChatGPT on private accounts; commentators expect integrated tools capable of monitoring staff to need a works-council agreement.⁹⁹ From December 2027, AI in EU employment decisions falls under the high-risk rules.¹¹ VERIFIED official Involving employee representatives early is the most direct way to get tools used.

75–100

basis points of owner margin
Hilton’s chief executive expects
from a bundle that includes AI

QUALIFIED operator

0

property-level reductions in
frontline jobs attributed to AI by
an operator

NOT FOUND

*The owner’s question:
which AI tools run in my
hotel, who pays for
them, and what has
changed since they were
switched on?*

6



CHAPTER 6 · PLATFORMS
AND GOVERNANCE



The property system becomes the control point

Why this matters. The AI a hotel can use in 2027 will mostly arrive through systems it already licenses. Contract terms agreed now decide who controls the data, what agents may change and what the hotel pays.

Whoever controls the property management system, or its cloud equivalent at brand level, controls what an agent can read, what it can change and what the service costs. Consolidation raised those stakes: Duetto announced the acquisition of FLYR Hospitality on 8 October 2026;¹⁰⁰ VERIFIED company IHG's new systems were due to reach 4,000 hotels by the end of 2026;¹⁰¹ Marriott is building a "model-agnostic AI chassis";¹⁰² Choice is standardising on Amazon Web Services for its agents.¹⁰³ LOW CONFIDENCE trade press

Open interfaces and emerging standards should lower lock-in: the Model Context Protocol, which lets agents call functions in other software, and Google's lodging booking protocol.¹⁰⁴ Ask three questions of any interface: are permissions set property by property, is every action logged, and can the data be exported?⁶⁴ VERIFIED vendor

Owners and franchisees have the least bargaining power and the most at stake. Hilton's US franchise disclosure document of March 2025, the one we checked, carried no separate AI fee line.¹⁰⁵ VERIFIED filing We found no owner dispute over AI fees. NOT FOUND

SETTLE IN WRITING BEFORE SWITCHING ON AGENT FEATURES

1. Which actions may the agent take, and which require approval?
2. Is every action logged, and can we see the log?
3. Can we export our data and conversation records?
4. How is AI usage priced, and is it itemised?
5. Will the vendor commit to AI disclosure where the law requires it?

The owner's contract schedule, in five parts, is on page 38.

Costs can move either way. Hyatt says owners' property-system costs fell 40% per room after its platform change, a platform saving rather than an AI result.⁶⁶ QUALIFIED operator

A short security record, and rules with dates.

Not a clean record

A Japanese face-recognition check-in provider left more than a million passports and driver's licences in publicly accessible storage, a configuration error rather than a model failure.¹⁰⁶ LOW CONFIDENCE press

A cybersecurity outlet reported that an attacker used AI tools to breach booking platforms and exposed about 2.1 million email addresses.¹⁰⁷ LOW CONFIDENCE trade press

Agents add a new exposure

Instructions hidden in emails, web pages or documents that an agent reads and then obeys. We found no hotel incident of this kind. NOT FOUND
The risk applies to any agent that reads outside content and can change records. Permission scopes and action logs are the defence.

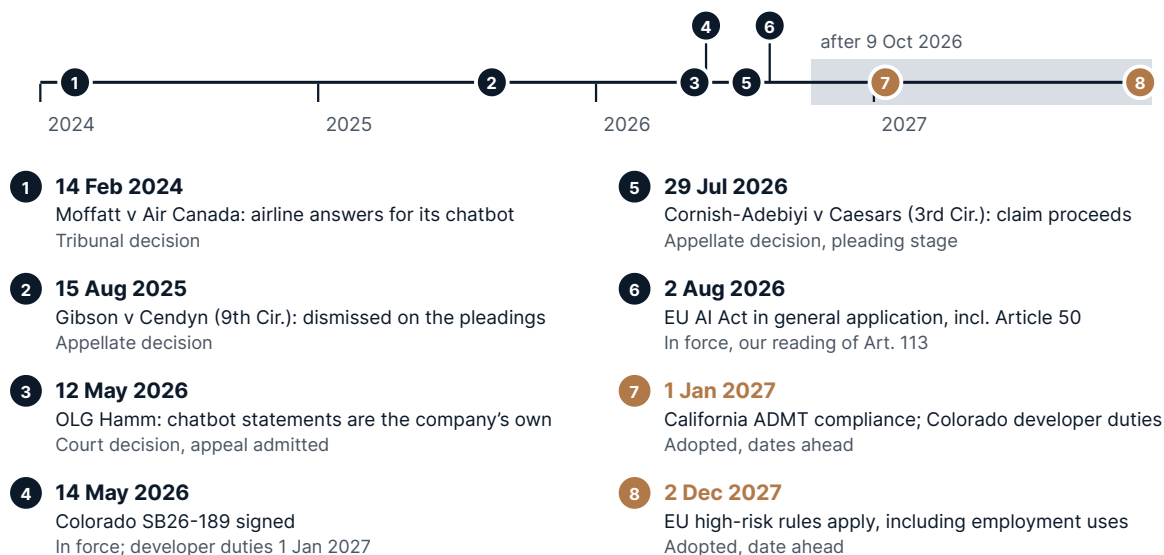


Figure 6.1. Rules and decisions in date order. Dates still ahead on 9 October 2026 are set in the accent colour. VERIFIED official General information, not legal advice: summaries of official texts and court decisions as read by the author, who is not a lawyer in any of these jurisdictions. That Article 50 applies from 2 August 2026 is our reading of Article 113, which lists no exception for it. 9-11,59,60,108

DISCLOSURE OUTLOOK

Telling guests they are dealing with AI is becoming a design requirement in the EU, and it is cheap to build in now. For most guest-facing hotel chat, the EU transparency rule and general consumer law matter more than the high-risk regimes, which bite mainly on employment uses.

PRICING CONTRACTS

The two US pricing cases make revenue-system terms a diligence matter: whether competitors' data are pooled, and whether recommended prices must be followed. Neither decision is a finding of liability.

AGENTS WITH WRITE ACCESS

Before an agent may change a record, settle the permission scope, the action log and who reviews it. Test it with hostile content before it reads guest email. The contract questions are on page 29.



Keys not yet cut

Why this matters. The capabilities on the horizon will reach hotels unevenly. Treating them as one future leads to premature spending or missed early tests, so each capability gets a 2027 status of its own.

Three levels for each capability: **availability** in 2027, **hotel experimentation**, and **likely significance** to typical hotel operations, our judgement.

CAPABILITY	AVAILABLE?	HOTEL EXPERIMENTATION	2027 SIGNIFICANCE
Constrained agents in property systems	Yes	Single-property vendor cases	High on open cloud systems
Advanced voice agents	Yes	Estate-scale deployments	High in economy, midscale, franchise
Multimodal AI (images plus language)	Yes for food waste; on sale for inspection	Vendor inspection trials	Medium
Computer-use agents	Yes, as general products	No hotel deployment found	Low to medium
Edge and on-device AI	Frameworks exist	One 2021 in-room pilot	Unresolved
AI training simulations	Products exist	No hotel outcome study	Unresolved
Delivery robots	Yes, with lift integration	Vendor cases; one academic case	Low, except large multi-floor
Public-area cleaning robots	Yes	Single-hotel reseller data	Low to medium
Humanoid and reception robots	No; pilots only	Seoul, Slovenia; a Shenzhen plan	Low

Figure 7.1. Significance is editorial judgement. ^{5,6,109-119} [OUTLOOK](#)

Two developments that reach hotels at different speeds.

Computer-use agents: why hotels should pay attention

Many hotels run systems with no modern interface. An agent that operates the same screens a person uses could connect AI to those systems without replacing them, which makes computer-use agents more relevant to hotels than to many industries. Reliability is the open question, and the two published tests are not comparable; neither involves hotel software.

The risks are specific: the agent needs staff credentials, it can be misled by content it reads, and it breaks when screens change. A sensible 2027 stance for a multi-property company is a monitored pilot on a low-risk internal task, such as compiling a morning report from several screens, kept away from guest bills and rates.

28–61%

success on live websites, independent 2025 evaluation¹¹⁰

VERIFIED independent

83–86%

on an offline desktop benchmark, mixed official and self-reported results¹¹¹

LOW CONFIDENCE vendor

0

hotel deployments of computer-use agents found

NOT FOUND

Robots: separate the categories

The robot hotel is still a cautionary tale. Henn na Hotel in Japan retired about half its robots in 2019 after they created more work for staff; the accounts trace to a single press report.¹²⁰ LOW CONFIDENCE press Its lessons about tasks robots could not finish and staff time spent supporting them apply fully to humanoids, and only partly to a delivery robot doing one job well.

Delivery robots that ride lifts and cleaning robots for corridors and lobbies are bought and operating;^{113,115} their payback in hotels has not been independently documented. NOT FOUND Humanoid receptionists are demonstrations and early pilots.¹¹⁸ Pudu and a Shenzhen partner plan a fully robot-serviced 44-room hotel, piloting in late 2026: a company plan, not a result.¹¹⁹ QUALIFIED vendor

OUR STANCE FOR 2027 OUTLOOK

Delivery, cleaning robots

Buyable and operating. Payback in hotels undocumented. Pilot selectively where there are many floors.

Humanoid receptionists

Demonstrations and early pilots. Defer; multi-property companies monitor the first operating data.

The Henn na lesson

Count the staff time a machine consumes before counting the time it saves.

Priorities by hotel operating model

Why this matters. A 30-room independent and a 5,000-hotel franchisor face the same technologies with different economics, systems and bargaining power.



THE INDEPENDENT

Resource-constrained, often without a revenue manager or a staffed night desk. Bargaining power: low. Its lever is the cleanliness of its own data and the choice of its next property system.

THE FULL-SERVICE OR LUXURY HOTEL

Service quality sets the standard. Prioritise the operating problem that matters most, whether repeated staff questions, missed guest enquiries, overtime or kitchen waste. Preserve guest choice, clear authority limits and a reliable handoff to a person.

THE MULTI-PROPERTY COMPANY OR FRANCHISOR

Sets the systems and the metric definitions for hundreds of hotels, and answers to owners for both.

THE FOUR ACTION KEYS

● ACT NOW

Established and relevant; low cost of being wrong; within the scope stated.

○ PILOT

A controlled test with a baseline and an exit rule.

● MONITOR

Consequential; needs more evidence or a more mature market.

● DEFER

Risks, costs or missing prerequisites outweigh the case.

A uniform AI strategy is the wrong strategy. The first moves for each model are on the next page; figure 8.1 on page 35 grades all seventeen developments; the owner of branded or managed hotels has pages 36 to 38.

Three kinds of hotel, three different first moves.

Each column lists every Act now row of figure 8.1 for that kind of hotel, then the pilots to run first. The move under each heading is the safest first step for that kind of hotel.

The resource-constrained independent

START AFTER HOURS.

ACT NOW · 5 ROWS OF FIG. 8.1

- Presence in AI answers: profiles, rates, policies, measurement
- Voice and messaging agents · after-hours, overflow
- Staff knowledge assistants · approved procedures
- Contract terms on data and permissions · terms when buying
- AI disclosure, inventory of AI uses, security testing · a disclosure line

PILOT FIRST

- Delegated pricing · if pricing by hand
- Agents inside the property system · narrow permissions

Pilot labour analytics only where overtime is material and time and payroll data are usable. Defer energy plant control, robots and computer-use agents: the scale is missing.

The full-service or luxury hotel

START WITH A REPEATED OPERATING PROBLEM.

ACT NOW · 4 ROWS OF FIG. 8.1

- Presence in AI answers: profiles, rates, policies, measurement
- Staff knowledge assistants · approved procedures
- Contract terms on data and permissions
- AI disclosure, inventory of AI uses, security testing

PILOT FIRST

- Food-waste measurement · one kitchen, baseline
- Voice and messaging agents · early escalation
- Group-sales scoring · back-test first

Monitor booking inside AI assistants, computer-use agents and delivery robots; defer humanoids.

The multi-property company or franchisor

START WITH METRIC DEFINITIONS.

ACT NOW · 7 ROWS OF FIG. 8.1

- Presence in AI answers: profiles, rates, policies, measurement
- Voice and messaging agents · defined metrics
- Delegated pricing · governance; pilot vendors
- Staff knowledge assistants · common policy, staged
- Food-waste measurement · rollout with baselines
- Contract terms on data and permissions · across the portfolio; itemise AI costs to owners
- AI disclosure, inventory of AI uses, security testing · agent register and testing

PILOT FIRST

- Labour and overtime analytics · comparison properties
- Computer-use agents · internal tasks

Monitor booking inside AI assistants and humanoids until the contracts and the first operating data exist.

BY MARKET · RICCARDO'S VIEW

My priorities would differ by market and by hotel. In Switzerland, I would give labour availability and cost substantial weight. Elsewhere, I would first establish what is holding the operation back. A salary set against a software subscription leaves out most of the comparison: I would compare the cost and quality of completing the task, including coverage, training and supervision. Attitudes towards data protection differ, and each hotel still needs clear rules for guest, staff and financial information.

The twelve trends unpacked: seventeen developments, three operating models.

DEVELOPMENT	INDEPENDENT	FULL-SERVICE	MULTI-PROPERTY
Presence in AI answers: profiles, rates, policies, measurement	 ACT NOW	 ACT NOW	 ACT NOW
Paid placement in AI answers	 MONITOR	 PILOT comparison period	 PILOT comparison markets
Booking inside AI assistants	 MONITOR	 MONITOR	 MONITOR settle contracts
Voice and messaging agents	 ACT NOW after-hours, overflow	 PILOT early escalation	 ACT NOW defined metrics
Delegated pricing	 PILOT if pricing by hand	 PILOT	 ACT NOW governance; pilot vendors
Group-sales scoring	 MONITOR	 PILOT back-test first	 PILOT
Agents inside the property system	 PILOT narrow permissions	 PILOT one bounded workflow	 PILOT reviewable logs
Staff knowledge assistants	 ACT NOW approved procedures	 ACT NOW approved procedures	 ACT NOW common policy, staged
Food-waste measurement	 MONITOR pilot if F&B is large	 PILOT one kitchen, baseline	 ACT NOW rollout with baselines
Energy plant optimisation	 DEFER	 PILOT	 PILOT
Labour and overtime analytics	 PILOT material overtime	 PILOT material overtime	 PILOT comparison properties
Contract terms on data and permissions	 ACT NOW terms when buying	 ACT NOW	 ACT NOW across the portfolio
AI disclosure, inventory of AI uses, security testing	 ACT NOW a disclosure line	 ACT NOW	 ACT NOW agent register and testing
Computer-use agents	 DEFER	 MONITOR	 PILOT internal tasks
Delivery and cleaning robots	 DEFER	 MONITOR	 PILOT selectively
Humanoid robots	 DEFER	 DEFER	 MONITOR
Agent authority over refunds, discounts, exceptions	 DEFER	 DEFER	 DEFER

Editorial judgement **OUTLOOK**. Colour never carries the meaning alone; each key carries its word. The small line under a key names the condition or the scope. Independent: a resource-constrained independent hotel. Full-service: a full-service or luxury hotel. Multi-property: a hotel company or franchisor. Trend 01 of the cabinet appears here as presence and paid placement, and trend 12 as delivery and cleaning robots and humanoids; the other ten trends are one row each. Three rows have no trend of their own: energy plant optimisation from chapter 4, computer-use agents from chapter 7, and agent authority over refunds, the grand master of the ladder.

The owner's page

Why this page exists. You pay for the property system and the brand's technology, and the brand or operator controls both. No source isolates how much of AI's value reaches you. You have two levers: the contract and the next owners' meeting. From chapters 5, 6 and 8. [OUTLOOK](#)

ACT NOW

- Ask the brand or operator, in writing: which AI tools run in my hotels, who pays for them, and what has changed in labour hours and distribution costs since they were switched on.
- At the next renewal, write into the agreement what an agent may change, that every action is logged and visible to you, that your data and conversation records can be exported, and that AI usage is priced and itemised. The contract schedule is on page 38.
- Ask for the brand's AI disclosure practice where the law requires it, and for its register of agents with write access.

PILOT

- Before accepting a portfolio rollout, ask for results from pilots run against comparison hotels, with the baseline and the period stated.
- In assets with a large food and beverage operation, agree food-waste measurement against a defined baseline; the clearest returns in this report are there.

MONITOR

- In-assistant booking: no fee is published, and Hilton's US franchise disclosure document of March 2025, the one we checked, carried no separate AI fee line. Ask how such bookings would be routed and charged.
- Owner disputes over AI fees: none found. The first will set the terms for the rest.

DEFER

- Any agent authority over refunds, discounts and policy exceptions, in your hotels or in the brand's central contact centre acting for them.

THE CHECK AN OWNER CAN RUN ALONE

Which AI tools run at owned hotels and who pays; technology-fee line items; labour-hour changes traceable to a named tool. No operator has published these.

WHAT THE BRANDS HAVE SAID

Hilton, 75 to 100 basis points of owner margin from a bundle that includes AI; Accor, cost reductions "likely 15%–30%", forecast or target not stated; Hyatt, property-system costs down 40% per room, a platform saving (pages 28 and 29).^{66,95,96} [QUALIFIED](#) operator None isolates AI's contribution. [NOT FOUND](#)

FIVE QUESTIONS FOR THE NEXT OWNERS' MEETING

- 1 Which actions may the agents in my hotels take without a person, and who set that limit?
- 2 Where is the log of what they did last month?
- 3 What are the resolution, transfer, abandonment and wrong-answer rates for the voice and messaging agents?
- 4 Which AI costs sit inside my technology fees, line by line?
- 5 What is the exit rule for each pilot running in my hotels?

HOW TO JUDGE A PILOT THE OPERATOR PROPOSES

- 1 **Name the objective.** Service quality, staff capacity and revenue need different measures.
- 2 **Fix the baseline** over a comparable season. For revenue tools, use your index against a competitive set.
- 3 **Compare rather than withhold.** Roll out in stages or compare with similar hotels, instead of denying guests a benefit to create a control group.
- 4 **Count the full cost:** licence, usage, integration, training and supervision time.
- 5 **Set the authority and the exit rule in advance:** what the system may do, what triggers human review and what result ends the pilot.
- 6 **Match controls to risk.** A disclosed question-answering bot needs lighter controls than an agent that can refund a stay.

The first 30 days are on the facing page; control, value and the contract schedule on page 38. To map your own hotels, the back page explains how to send a written enquiry.

One recurring task, tested in real work, within 30 days.



RICCARDO'S VIEW

Get close to the work, with the general manager accountable

I want owners to hear directly from the people doing the work, including those whose useful AI practices may never reach a management presentation. That person may be a room attendant.

The general manager should be involved and accountable for turning the findings into action. The owner stays responsible for the value sought and the risks accepted; each workflow needs someone responsible for delivery.

DAYS 1 TO 7

Find out what is already happening

With the general manager involved and within the agreed governance arrangements, speak directly with department heads and frontline staff. Invite good-faith disclosure of approved and unapproved AI use, without blame, and explain the data rule at the same time. Stop unsafe practices and refer suspected data exposure to the responsible privacy or security lead. Ask how each result was produced, beyond the presentation.

DAYS 8 TO 14

Choose one recurring task

Form a small, owner-backed working group with frontline representation, a management lead and a named person responsible for the task. Find someone who can demonstrate a useful, repeatable workflow and explain how they check it. Record the existing time, quality and rework before changing the process. Choose an approved tool and suitable data.

DAYS 15 TO 21

Test in real work

Use the workflow on repeated instances of the task. Record preparation, checking, correction and supervision as well as production time. Keep a person responsible for the output, and document errors and exceptions.

DAYS 22 TO 30

Review and decide

The group brings the owner and the general manager a one-page result: what changed, time used before and after, quality, costs, remaining risks and the next decision. Continue, adapt or stop. Record the result as it is, whatever the deadline.

THE 30-DAY TARGET

One recurring task tested in real use, with a documented baseline, acceptable quality, net time saved after checking and correction, and a named person responsible for continuing it. If the work did not improve, record that. Time released becomes a payroll saving only where a payable cost falls.

Candidate tasks: a standard recipe-documentation workflow, or a work-certificate draft using appropriate data, with the required human approval. Both are candidates to test. The working group follows the governance the owner, the operator and the general manager have agreed; disclosure is invited in good faith and carries no legal promise.

Three kinds of control, one contract schedule.



RICCARDO'S VIEW

What did my hotel gain?

A brand may have a sound reason to standardise a system across its hotels. As an owner, I would still ask what the individual property gains, what it pays and which decisions it can control. A deployment count across hundreds of hotels leaves those questions open.

I want the outcome shown in service, conversion, average daily rate, net revenue or operating cost, with the relevant baseline. I would also ask who can authorise a new tool, change its permissions, examine its actions and stop it. Those rights should be clear before the hotel carries the cost and the risk.

THREE KINDS OF CONTROL, EACH SET BY ITS OWN CONTRACT

Distribution

Where the hotel is sold, through which channels and at what cost. The franchise or management agreement and each channel contract set who decides.

Operating systems

Which property system and connected tools the hotel runs, and who configures them. The technology terms of the agreement set who decides.

AI permissions

What each tool may read and change, who reviews its record and who can stop it. The contract schedule below sets who decides.

WHAT TO SETTLE IN AN AI CONTRACT SCHEDULE

- 1 **Purpose and access.** Identify approved uses, providers and the financial, guest and staff data each may access. Apply access according to the task and the role.
- 2 **Processing and retention.** Classify sensitive information; minimise what is sent; mask personal data where appropriate; prohibit provider training on hotel data; specify retention and deletion, including logs and any required retention exceptions.
- 3 **Authority and approval.** Specify what an agent may change, the approval thresholds and how the limits are enforced in the operating systems. Refunds, discounts and policy exceptions stay deferred, as in figure 8.1.
- 4 **Visibility and cost.** Agree reviewable records of processing and actions, appropriate owner oversight and itemised AI charges, with access to personal information limited to what the task needs.
- 5 **Incidents and exit.** Define incident responsibilities, suspension of access, export of data and records, and support when a tool or provider is replaced.

Proposed requirements for technical and legal drafting: a brief for the lawyers, not a ready-to-sign clause, and no guarantee of compliance. A data gateway can be part of the design. It controls which data reach a tool; the permissions in the operating systems control what the tool may do. Test any agent with hostile content before it reads guest email (page 30).

Eleven signals that would change the outlook

Why this matters. The evidence will move quickly, so check these signals each quarter. Each names the row of figure 8.1 it would move and to which action; where the row is already Act now, it says what changes.

SIGNAL 01 Google publishes a fee for AI Mode bookings

→ Booking inside AI assistants: Monitor to Pilot for multi-property companies; independents and full-service hotels compare the fee with their agency commission

SIGNAL 02 AI Mode booking launches outside the US

→ Booking inside AI assistants: Monitor to Pilot for non-US hotels of all three kinds

SIGNAL 03 Booking or Expedia disclose completed AI-agent bookings

→ Presence in AI answers is already Act now; what changes is the benchmark: compare the direction and pace of your AI-referred share with theirs

SIGNAL 04 Evidence that paid units change organic recommendations

→ Paid placement: Pilot to Act now for full-service and multi-property, Monitor to Pilot for independents; or Defer for all if the effect harms the shortlist

SIGNAL 05 A brand defines and publishes voice-agent metrics

→ Voice and messaging agents: Pilot to Act now for full-service hotels under that brand; franchisees gain a comparison

SIGNAL 06 Hilton publishes hotel-level Green Ramadan data

→ Food-waste measurement: Pilot to Act now for full-service hotels if the hotel-level data confirm the reductions; no move if they do not

SIGNAL 07 An independent evaluation of delegated pricing

→ Delegated pricing: Pilot to Act now for independents and full-service hotels if the effect holds across hotel types

SIGNAL 08 First EU enforcement of AI disclosure against a guest bot

→ AI disclosure is already Act now; what changes is urgency and the wording of guest-facing scripts

SIGNAL 09 A security incident involving an agent with write access

→ Agents inside the property system: Pilot to Monitor until scopes and logs are proven; contract terms move from questions to clauses

SIGNAL 10 Results from humanoid hotel trials

→ Humanoid robots: Defer to Monitor for full-service hotels and Monitor to Pilot for multi-property companies, or no move

SIGNAL 11 An owner dispute over AI-related fees

→ Contract terms are already Act now; what changes is the clause wording and who pays, which move from question to precedent

HOW TO USE THE WATCHLIST

Review these external signals alongside your own results. Local performance, risk or changed operating conditions may justify changing an action sooner. A signal that fires moves one row of figure 8.1 for the kinds of hotel it names. None of the eleven is forecast here, and the moves are judgement. [OUTLOOK](#)

THE TWO THAT MATTER MOST TO OWNERS

Signal 01, a published fee, because it prices the shortlist. Signal 11, the first owner dispute over AI fees, because it sets the terms for everyone who comes after.



The watchlist as a register.

One line per signal, four checks a year.

At each quarterly review, mark the date, note whether the signal has fired, and move the row of figure 8.1 it names. Your own results, risks or changed conditions can move a row sooner.

SIGNAL · ROW OF FIGURE 8.1	MOVE IF IT FIRES	CHECKED ON	FIRE? EFFECT
SIGNAL 01 Google publishes a fee for AI Mode bookings Booking inside AI assistants	Monitor → Pilot (multi-property)		
SIGNAL 02 AI Mode booking launches outside the US Booking inside AI assistants	Monitor → Pilot (non-US hotels)		
SIGNAL 03 Booking or Expedia disclose completed AI-agent bookings Presence in AI answers	Act now stands; benchmark changes		
SIGNAL 04 Evidence that paid units change organic recommendations Paid placement	Pilot → Act now, or Defer for all		
SIGNAL 05 A brand defines and publishes voice-agent metrics Voice and messaging agents	Pilot → Act now (that brand)		
SIGNAL 06 Hilton publishes hotel-level Green Ramadan data Food-waste measurement	Pilot → Act now, or no move		
SIGNAL 07 An independent evaluation of delegated pricing Delegated pricing	Pilot → Act now (independents, full-service)		
SIGNAL 08 First EU enforcement of AI disclosure against a guest bot AI disclosure	Act now stands; urgency changes		
SIGNAL 09 A security incident involving an agent with write access Agents inside the property system	Pilot → Monitor		
SIGNAL 10 Results from humanoid hotel trials Humanoid robots	Defer → Monitor, Monitor → Pilot, or no move		
SIGNAL 11 An owner dispute over AI-related fees Contract terms	Act now stands; clause wording changes		

YOUR KEY REGISTER

The list the letter on page 2 asks you to keep: one line per AI system already running in your hotels.

SYSTEM	VENDOR	RUNG	CLAUSE THAT LIMITS IT	RENEWAL DATE

The moves are the ones named on page 39are editorial judgement **OUTLOOK**. For the rows themselves, see figure 8.1 on page 35the three operating models on page 34.

The fourth check of the year is the moment to compare your register with the next edition of this report.



CHAPTER 10 · CLOSING ASSESSMENT

Keep three questions apart

10

On the outside, the guest's shortlist is increasingly composed by AI. Two platforms are building different business models around it, and the first hotel checkout inside an AI answer opened in the US without published fees. The effect so far is on attention. That gives hotels a limited window to put profiles, rates and measurement in order and to ask their partners precise questions about cost.

On the inside, agents with bounded authority answer guests, take reservations, log requests and publish prices. Their value depends less on how often they resolve a contact than on how quickly a frustrated guest reaches a person. The clearest measured returns are where the baseline can be weighed or metered, and even there the best-known programme needed its vendor to explain which baseline each figure uses.

01

Authority is the strategic decision

What a system may do without asking, and who sets that limit, belongs to management and in contracts. People set the service standard, handle exceptions and stay accountable.

02

Measurement is the competitive advantage

Limited published evidence is a reason to test carefully. A partial improvement justifies the investment when its measured value exceeds the full cost and the remaining risk is acceptable. Show what improved in the operation.

03

Different hotels move at different speeds

The franchisor, the full-service hotel, the independent and the owner face the same technologies with different economics. The mix of people and systems should fit each operating model; chapter 8 gives each its agenda.

In 2027, AI earns its place in a hotel where someone has measured what it changed.

Claims in circulation that this report does not repeat.

CLAIM	STATUS	WHY
"Hotel AI adoption is nearly universal."	Rejected	True only of large, engaged chains in sponsored surveys. Official statistics put sector use at about 10% to 21%.
A 5.6% profit effect from the State of Hotel AI survey	Not used	The figure is not on the public page; the full results are gated to participants.
A 0.5% to 3% share of hotel bookings completed by AI agents in 2027	Rejected	No transparent model behind any such figure. Replaced by three qualitative scenarios.
A generic RevPAR uplift from AI pricing	Rejected	The three published results measure different things against different baselines. Not a range.
"About 90%" of pricing recommendations accepted	Not used	From a law-firm summary; the figure is not in the court opinion.
AI's value is captured by brands and vendors rather than owners	Not shown	Stated in this report as an open question. No source isolates it either way.
"AI is already replacing front-desk jobs."	Not shown	No property-level reduction in frontline jobs attributed to AI by an operator was found. The documented job changes sit above the property.

Methods and evidence standards

Evidence base. Three research phases: a horizon scan of the public record, an audit that checked 325 claim-and-source pairs against source text and retrieved primary texts from courts, legislatures, regulators, SEC filings and publishers, and a second review pass independent of the drafting. Every cited number was matched against the stored source text. Sources repeating one press release, survey or call count once.

AI assistance. AI tools assisted the retrieval of sources, the checking of numbers against source text, and the drafting and editing of the text, and generated the still-life illustrations. The author set every grading and judgement and is responsible for the final text.

Labels. As set out on page 3, with the rungs of the ladder on page 16. The key cabinet adds maturity words: established, early, one chain.

Research and commentary, kept separate. The research draws on public documents and the verification correspondence on page 43, with evidence current to 9 October 2026. The Riccardo's view passages come from an interview summary dated 16 October 2026 and the author's professional recollections; they are not independent evaluations of the outcomes discussed. No confidential records were used.

What we did not do. One verification request was sent before publication, to Hilton and to Winnow. Winnow answered; Hilton had not replied when this edition closed. The request and the answers are on page 43. Nothing in this report is confirmed by an operator beyond its published material. We did not bypass logins, paywalls or bot protection. Four academic sources, among them the two independent outcome studies, were read as abstracts only; each is labelled. Search-engine summaries were not treated as evidence.

Limits. Coverage is mainly English-language, with thinner evidence from Asia, the Gulf and non-English Europe; much Gulf and Asian evidence is announcement-level, and the report says so rather than forcing symmetry. Many hotel results are published by sellers. Operators rarely publish failures, so an absence of reported failures is not evidence that none occurred.

Forecasts. Where no transparent model exists we give scenarios. No adoption percentage, booking share, cost saving or return range here is our own estimate.

What this report leaves out. Engineering and asset management, finance and HR receive selective coverage. Housekeeping appears through task and inspection tools (chapter 3), attendant scheduling under trend 09 (chapter 4) and physical automation (chapter 7), a partial view of the department.

What was asked of Hilton and Winnow, and what Winnow answered.

One verification request was sent by the author in October 2026 to Hilton's EMEA corporate communications, which issued both releases, and to Winnow, the vendor whose system produced the measurements. No other operator was asked. Winnow replied in October 2026 and, on 16 October, sent the results release as Hilton had amended it: the starting point now reads 87 g. Hilton had not replied when this edition closed; a reply will go into a revised edition and onto giacometti-consulting.com.

THE REQUEST · SENT OCTOBER 2026

Your 2025 results release for Green Ramadan reports a 26% plate-waste reduction (102 g to 64 g per cover), 6,376 meals and 10.9 t CO₂e across 45 hotels. The January 2026 award release reports more than 80% per cover against 2023, 18,900 meals and 32.4 t CO₂e for the same hotels. Could you confirm which baseline and period each figure uses, and whether the two can be reconciled? We would welcome weekly hotel-level data, a note of which interventions ran where, and the system cost.

WINNOW'S ANSWERS · OCTOBER 2026 QUALIFIED VENDOR

Baselines and periods. The results release covers the 2025 campaign against a 2025 baseline. The award release reports the aggregate impact since Green Ramadan launched in 2023, against the original 2023 baseline per cover.

Which figures to use. On its own, the first set is correct for 2025. For the overall impact of the programme as of 2025, the second set is the better reflection.

The 26%. The release footnote contained a minor error. The 102 g is the end-of-campaign figure from Green Ramadan 2024; the footnote should read from a 2025 baseline of 87 g to 64 g at the end of the campaign. The amended release now reads so.

Summarised from the reply of Winnow's Director of Marketing & Public Affairs.

Glossary

Agent AI software that carries out tasks in other systems within the permissions it has been given.

Authority ladder This report's five-rung grading of what an AI system may do without asking: advise, draft, act with approval, act within bounds, open-ended.

Computer-use agent An agent that operates software through its screens, as a person would.

GOP Gross operating profit: revenue less departmental and undistributed operating costs, before management fees and fixed charges.

Merchant of record The party that takes payment and holds the contract with the guest.

Model Context Protocol An open standard that lets AI agents call functions in other software.

OTA Online travel agency.

Property management system The hotel's core system for reservations, rooms and billing.

RevPAR Revenue per available room.

The master key Acting alone within set limits and escalating exceptions: rung four, the authority handed over in 2026.

CREDITS

Research, writing and design: Riccardo Giacometti, Cross-Point, Zug. Still-life images generated with Higgsfield; illustrative, no real property shown. Type: Inter and Charis SIL. General information only; it is not investment, legal or compliance advice.

COMPANION FILES

One-page summary · press fact pack · evidence ledger (CSV) · source list (CSV) · chart data (CSV) · image list, at giacometti-consulting.com, the site of Riccardo Giacometti GmbH, which trades as Cross-Point. Questions and corrections: riccardo.giacometti@cross-point.ch.

SOURCES

Numbered in order of first citation. Author or organisation, title, date, identifier where one exists, and the address consulted. Access notes and commercial relationships for every source are in sources.csv.

- 1 Google (James Byers). *How to book travel with AI Mode in Google Search*. 27 August 2026. <https://blog.google/products-and-platforms/products/search/book-travel-ai-mode>
- 2 Wyndham Hotels and Resorts (Geoffrey Ballotti and management). *Q2 FY2026 earnings call, transcript via Bullfincher*. 23 July 2026. https://d1io3yog0oux5.cloudfront.net/_b5c5e7795366b2bc842cc10ae38e70b0/wyndhamhotels/db/2238/23683/webcast_transcript/CORRECTED+TRANSCRIPT_+Wyndham+Hotels+%26+Resorts%2C+Inc.%28WH-US%29%2C+Q2+2026+Earnings+Call%2C+23-July-2026+8_30+AM+ET.pdf
- 3 OpenAI. *ChatGPT Ads expands across Europe*. 18 August 2026. <https://openai.com/index/chatgpt-ads-expands-across-europe/>
- 4 Google. *New ad formats built with Gemini coming to Google Search*. 20 May 2026. <https://blog.google/products/ads-commerce/google-marketing-live-search-ads/>
- 5 Oracle Corporation. *New AI Capabilities in Oracle OPERA Cloud Supercharge Hotel Operations, press release*. 16 June 2026. <https://www.oracle.com/news/announcement/new-ai-capabilities-in-oracle-opera-cloud-supercharge-hotel-operations-2026-06-16/>
- 6 Hotel Tech Report, reproducing the Apaleo release. *Apaleo launches AI Copilot to ease operational pressure on hotel teams*. 26 March 2026. <https://hoteltechreport.com/news/apaleo-launches-ai-copilot-to-ease-operational-pressure-on-hotel-teams>
- 7 Tiger Brokers, reporting H World Group Q2 2026 results. *Huazhu's Strategic Momentum Translates into Measurable Growth with Upgraded Annual Outlook*. 17 August 2026. <https://www.itiger.com/news/1161622712>
- 8 Mews (Richard Smithies, Conor Winders, Matthijs Welle). *Can AI-based pricing lift hotel revenue? Testing the impact of Mews RMS autopilot, Mews podcast episode 88*. 29 July 2026. <https://www.mews.com/en/resources/podcasts/can-ai-based-pricing-lift-hotel-revenue-testing-the-impact-of-mews-rms-autopilot>
- 9 European Parliament and Council. *Regulation (EU) 2024/1689, the Artificial Intelligence Act, Official Journal*. 12 July 2024. <https://eur-lex.europa.eu/eli/reg/2024/1689/oj/eng>
- 10 California Privacy Protection Agency. *CCPA regulations on cybersecurity audits, risk assessments and automated decision-making technology, approved text*. 2025. https://coppa.ca.gov/regulations/pdf/ccpa_updates_cyber_risk_admt_appr_text.pdf
- 11 European Parliament and Council. *Regulation (EU) 2026/1744 of 8 July 2026, the Digital Omnibus on AI, Official Journal*. 24 July 2026. <https://eur-lex.europa.eu/eli/reg/2026/1744/oj/eng>
- 12 Shiji Group via Hospitality Net; study by h2c. *New h2c Study: AI Adoption Is Widespread Among Hotel Chains, but Enterprise Readiness Remains Limited*. 1 October 2026. <https://www.hospitalitynet.org/news/4134680/new-h2c-study-ai-adoption-is-widespread-among-hotel-chains-but-enterprise-readiness-remains-limited>
- 13 Wyndham Hotels and Resorts, survey by Wakefield Research. *Hotel Owners at an AI Crossroads as Confidence and Growth Plans Hold Firm: 2026 Owner Trends Report*. 2026. <https://corporate.wyndhamhotels.com/news-releases/hotel-owners-at-an-ai-crossroads-as-confidence-and-growth-plans-hold-firm-wyndham-owner-trends-report-finds>
- 14 HES-SO Valais-Wallis, School of Management. *AI Adoption in European Hotels 2025*. <https://hotelinside.ch/wp-content/uploads/PDF-AI-Adoption-in-European-Hotels-2025.pdf>
- 15 Office for National Statistics. *Artificial intelligence in UK businesses: 2023 to 2026*. <https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/articles/artificialintelligenceinukbusinesses/2023to2026>
- 16 Eurostat. *Enterprises using AI technologies, dataset isoc_eb_ain2, NACE I, 10+ employees*. 2025 data. https://ec.europa.eu/eurostat/databrowser/view/isoc_eb_ain2/default/table?lang=en
- 17 US Census Bureau. *Business Trends and Outlook Survey, AI use by sector, cycles 202616 to 202620*. 8 October 2026. <https://www.census.gov/hfp/btos/downloads/Sector.xlsx>
- 18 Destination AI, research by Josiah Mackenzie (Actabl). *The State of AI in the Hotel Industry, Fall 2026 Research*. 29 September 2026. <https://stateofhotelai.com>
- 19 Sloan Dean, AI Hospitality Group, on Hospitality Net. *Not Done Weekly: Destination AI Summit Recap, opinion*. 5 October 2026. <https://www.hospitalitynet.org/opinion/4134731/not-done-weekly-destination-ai-summit-recap>
- 20 Ken Yeung, The Letter Two, reporting Adobe research. *Adobe Report: AI Travel Traffic Surges as Visibility Lags*. 21 August 2026. <https://thelettertwo.com/2026/08/21/adobe-ai-travel-traffic-visibility-gap-july-2026>
- 21 Lighthouse via eHotelier Insights. *The numbers behind AI's rise as a booking channel for independent hotels*. 7 July 2026. <https://insights.ehotelier.com/insights/2026/07/07/the-numbers-behind-ais-rise-as-a-booking-channel-for-independent-hotels/>
- 22 Booking Holdings (Glenn Fogel, Ewout Steenberg). *Q2 FY2026 earnings call, transcript via Bullfincher*. 4 August 2026. https://finance.yahoo.com/quote/BKNG/earnings/BKNG-Q2-2026-earnings_call-656434.html
- 23 White Sky Hospitality. *Everyone's Panicking About AI and Hotel Bookings. The Data Says Something Else*. 8 July 2026. <https://whiteskyhospitality.com/everyones-panicking-about-ai-and-hotel-bookings-the-data-says-something-else/>
- 24 Xavi Amatriain, Expedia Group Partner blog. *AI Trust Gap: Why Travelers Will Continue to Choose Trusted Brands*. 14 April 2026. <https://partner.expediagroup.com/en-us/resources/blog/ai-trust-gap-why-travelers-continue-to-choose-trusted-brands>
- 25 Andrew Paul, Americas Great Resorts. *The AGR Luxury Hotel AI Visibility Index 2026*. <https://www.americasgreatresorts.net/ai-visibility-index/>
- 26 Nicolas Sitter. *AI Hotel Rankings Are Not Random: 2026 Consistency Study*. February 2026. <https://nicolassitter.com/research/ai-hotel-rankings-consistency-study-2026>
- 27 Ricardo Batista, cloro. *Hotel Travel SEO: Which Hotels ChatGPT Recommends*. undated. <https://cloro.dev/blog/hotel-travel-seo/>
- 28 Hotel Technology News, reporting the Cloudbeds report *The Signals Behind Hotel AI Recommendations. Research: OTAs Dominate as Primary Source in AI-Powered Hotel Discovery*. 3 July 2025. <https://hoteltechnologynews.com/2025/07/research-otas-dominate-as-primary-source-in-ai-powered-hotel-discovery/>

SOURCES, CONTINUED

- 29 Louise Linehan, Ahrefs. *We Tracked 1,885 Pages Adding Schema. AI Citations Barely Moved*. 11 May 2026. <https://web.archive.org/web/2026/https://ahrefs.com/blog/schema-ai-citations/>
- 30 OpenAI Help Center. *Ads in ChatGPT*. undated. <https://help.openai.com/en/articles/20001047-ads-in-chatgpt>
- 31 OpenAI Help Center. *Ads Manager availability*. undated. <https://help.openai.com/en/articles/20001245-ads-manager-availability>
- 32 Hospitality Net, HN Brief. *Google Ships Agentic Booking and Puts a Points Price Beside Your Rate*. 28 August 2026. <https://www.hospitalitynet.org/editorial/4134140/google-ships-agentic-booking-and-puts-a-points-price-beside-your-rate-hvs-holds-45-for-2026-98-of-ready-buyers-abandon-anyway>
- 33 Google Hotel Center Help. *About Google third-party rates for hotel ads*. undated. <https://support.google.com/hotelpolicies/answer/14310302?hl=en-GB>
- 34 European Commission. *Commission fines Google EUR 890 million for breaches of the Digital Markets Act*. 23 July 2026. https://digital-markets-act.ec.europa.eu/commission-fines-google-eur890-million-breaches-digital-markets-act-2026-07-23_en
- 35 PPC Land. *Google AI Mode completes hotel bookings with 10 partners in US rollout*. 27 August 2026. <https://ppc.land/google-ai-mode-completes-hotel-bookings-with-10-partners-in-us-rollout/>
- 36 WARC and PHD. *From Abundance to Agents: agentic-facilitated consumer spend forecast*. July 2026. <https://s3.amazonaws.com/media.mediapost.com/uploads/PHDWARCagenticfacilitated.pdf>
- 37 IDC. *Agentic AI will redefine travel and hospitality in 2026*. undated. <https://www.idc.com/resource-center/blog/agentic-ai-will-redefine-travel-and-hospitality-in-2026/>
- 38 Relevant Audience. *Google to move AI Mode hotel booking onto UCP*. 29 September 2026. <https://www.relevantaudience.com/ai/google-ucp-lodging-draft-ai-mode-hotel-booking/>
- 39 Hilton Worldwide Holdings Inc. *Form 10-K for the fiscal year ended 31 December 2025, risk factors, SEC EDGAR*. 11 February 2026. <https://www.sec.gov/Archives/edgar/data/1585689/000158568926000007/hlt-20251231.htm>
- 40 Mews Systems. *Rates, Connector API, Mews Open API documentation*. undated. <https://docs.mews.com/connector-api/operations/rates>
- 41 MCPBundles, third-party directory not affiliated with Cloudbeds. *Cloudbeds MCP Server and Skill*. undated. <https://www.mcpbundles.com/directory/cloudbeds>
- 42 Canary Technologies with Wyndham Hotels and Resorts. *Canary and Wyndham Roll Out AI Voice Globally*. 10 December 2025. <https://www.canarytechnologies.com/press/canary-wyndham-global-ai-voice>
- 43 Wyndham Hotels and Resorts. *Wyndham Hotels and Resorts Reports Strong Second Quarter Results*. 22 July 2026. <https://corporate.wyndhamhotels.com/news-releases/wyndham-hotels-resorts-reports-strong-second-quarter-results-2/>
- 44 Huazhu Group (H World) and Tencent Cloud, via IT Home and 10jqka.com.cn. *Huazhu and Tencent Cloud build an AI in-stay service team across ten thousand hotels (Chinese)*. 3 June 2026. <https://stock.10jqka.com.cn/20260603/c677179623.shtml>
- 45 HelloShift. *What 15 Months of AI-Answered Hotel Calls Reveal About the Front Desk*. 23 June 2026. <https://www.helloshift.com/news/what-hotel-guests-call-about-ai-voice-data>
- 46 Revinate, Hotel Moment podcast episode 194. *We secret-shopped 300+ calls. Here's what we found*. 26 August 2026. <https://www.revinate.com/hotel-moment-podcast/secret-shopper-300-hotel-reservation-calls/>
- 47 Mews. *89% of guests want AI working behind the scenes, not running the front desk, Mews finds*. 7 October 2026. <https://www.mews.com/en/press/new-mews-data-guests-want-ai-in-background>
- 48 HiJiffy via Hotel Tech Report. *AI-Powered Messaging Helps Paradise Resort Achieve 12% More Direct Bookings and 82% WhatsApp Engagement*. 2025. <https://hoteltechreport.com/it/success-stories/marketing/hijiffy/paradise-resort-gold-coast>
- 49 DialogShift. *One Year of AI-Powered Guest Communication: DialogShift and Motel One Draw a Positive Balance*. 3 March 2026. <https://www.dialogshift.com/en/blog-posts/dialogshift-and-motel-one-draw-a-positive-balance>
- 50 Leonardo Garcia-Curtis, Waboom. *Auckland Boutique Hotel: 47% After-Hours Bookings via AI*. 30 April 2026. <https://www.waboom.ai/blog/auckland-boutique-hotel-after-hours-bookings>
- 51 Noor Adatia, Hotel Dive. *Hotel Tech-in: The boutique hotel in Maine operating without a front desk*. 29 July 2026. <https://www.hoteldive.com/news/maine-hotel-operating-without-front-desk/826535/>
- 52 Karn Dhinra, Texas A&M Stories; study by Babak Taheri et al. *Research finds hotel booking chatbots can 'creep out' customers*. 28 May 2026. doi:10.1016/j.ijhm.2025.104428 <https://stories.tamu.edu/news/2026/05/28/research-finds-hotel-booking-chatbots-can-creep-out-customers/>
- 53 Akhtar, Gupta, Taheri and Alghafes. *Unveiling the role of chatbot conversational attributes of hospitality booking platforms. International Journal of Hospitality Management. Abstract consulted*. 2025. doi:10.1016/j.ijhm.2025.104428 <https://doi.org/10.1016/j.ijhm.2025.104428>
- 54 Flexkeeping (Mews). *Flexie AI: AI task manager for multilingual hotel teams*. undated. <https://flexkeeping.com/flexie-ai>
- 55 Hotel Technology News. *Four Seasons Kuala Lumpur Introduces AI-Driven Event Experiences as Luxury Hotels Test New Engagement Models*. 18 April 2026. <https://hoteltechnologynews.com/2026/04/four-seasons-kuala-lumpur-introduces-ai-driven-event-experiences-as-luxury-hotels-test-new-engagement-models/>
- 56 Hotel Technology News. *Hilton Harnesses the Power of Technology to Improve Accessibility for Blind and Low Vision Guests*. 17 October 2024. <https://hoteltechnologynews.com/2024/10/hilton-harnesses-the-power-of-technology-to-improve-accessibility-for-blind-and-low-vision-guests/>
- 57 Wang Y., Zhu C., Feng T., Lu L. X., Jia B. *Agentic AI and Human-in-the-Loop Interventions: Field Experimental Evidence. arXiv preprint 2605.14830*. May 2026. <https://arxiv.org/pdf/2605.14830>
- 58 Terence Ronson, Hotel Online. *Forget Me Not, opinion column*. 5 October 2026. <https://www.hotel-online.com/news/forget-me-not>
- 59 Civil Resolution Tribunal of British Columbia. *Moffatt v. Air Canada, 2024 BCCRT 149*. 14 February 2024. <https://decisions.civilresolutionbc.ca/crt/crtd/en/item/525448/index.do>

SOURCES, CONTINUED

- 60 Oberlandesgericht Hamm. *Urteil 4 UKI 3/25*. 12 May 2026. ECLI:DE:OLGHAM:2026:0512.4UKL3.25.00 https://nrrwe.justiz.nrw.de/olgs/hamm/j2026/4_UKI_3_25_Urteil_20260512.html
- 61 The Guardian. *AI summaries of Tripadvisor hotel reviews downplay serious complaints, investigation finds*. 2 July 2026. <https://www.theguardian.com/business/2026/jul/02/ai-summaries-tripadvisor-hotel-reviews-downplay-serious-complaints>
- 62 Apaleo (Anna Fechner). *Trace Agent: AI handles guest requests*. 24 February 2026. <https://www.apaleo.com/customer-stories/hotel-groups-chains/apaleo-and-THE-FLAG-bring-agentic-AI-into-live-hotel-operations>
- 63 Apaleo (Anna Fechner). *Regiohotel automates calls with AI*. 12 March 2026. <https://www.apaleo.com/customer-stories/hotel-groups-chains/regiohotel>
- 64 Apaleo Developer Documentation. *Scopes and permissions*. undated. <https://apaleo.dev/guides/api/scopes.html>
- 65 Doug Kennedy / Hotel Online. *Are AI-Powered RFP Responses Really Good for Hotel Group Sales?* 27 August 2026. <https://www.hotel-online.com/news/are-ai-powered-rfp-responses-really-good-for-hotel-group-sales>
- 66 Hyatt Hotels Corporation (Mark Hoplamazian, Joan Bottarini). *Q2 2026 earnings call, transcript by The Motley Fool via Webull*. 2026. <https://www.webull.com/news/15341695144829952>
- 67 AltexSoft, summarising Hyatt statements. *Hyatt Expands ChatGPT Enterprise After 2 Years of AI Prep*. 21 April 2026. <https://altexsoft.com/travel-industry-news/hyatt-expands-chatgpt-enterprise-after-2-years-of-ai-prep/>
- 68 Sharon Goldman, Fortune. *Hyatt says AI isn't replacing workers: it's giving them more time to focus on guests*. 2026. <https://fortune.com/2026/06/09/ai-isnt-replacing-hyatts-salespeople-its-giving-them-an-extra-workday-every-week/>
- 69 Mews Marketplace. *Mews x Miqa, The Hospitality App Store*. undated. <https://www.mews.com/en/products/marketplace/miqa>
- 70 Hotel Management. *BirchStreet Systems launches AI-driven Smart AP*. 24 February 2026. <https://www.hotelmanagement.net/tech/birchstreet-systems-launches-ai-driven-smart-ap-automate-accounts-payable>
- 71 Mandarin Oriental Hotel Group, via Journal des Palaces. *Mandarin Oriental embraces artificial intelligence to set a new standard in food waste reduction*. 2025. <https://www.journaldespalaces.com/en/pressrelease-70735-Mandarin-Oriental-embraces-artificial-intelligence-to-set-a-new-standard-in-food-waste-reduction-for-luxury-hospitality.html>
- 72 Travolution. *First Look: Marriott Hotels UK, Ireland and Nordics achieves food waste reduction by 25% with Winnow AI*. 4 October 2024. <https://www.travolution.com/news/travel-sectors/accommodation/first-look-marriott-hotels-uk-ireland-and-nordics-achieves-food-waste-reduction-by-25-with-winnow-ai/>
- 73 Orbisk. *Using AI to reduce food waste at Hyatt Regency Aqaba Ayla Resort, customer story*. 27 October 2025. <https://orbisk.com/?p=25546262>
- 74 Sigala E. G. et al. *Reducing food waste in the HORECA sector using AI-based waste-tracking devices. Waste Management 198, 77 to 86. Abstract consulted*. 2025. doi:10.1016/j.wasman.2025.02.044 <https://pubmed.ncbi.nlm.nih.gov/40024032/>
- 75 Leverenz D., Flores J., Eriksson M. *How accurate are food waste tracking systems? Insights from healthcare and hotel kitchens. Resources, Conservation and Recycling 226*. 2025. doi:10.1016/j.resconrec.2025.108689 <https://pub.epsilon.slu.se/38907/1/leverenz-d-et-al-20251120.pdf>
- 76 Champions 12.3, WRI and WRAP. *The Business Case for Reducing Food Loss and Waste: Hotels*. April 2018. https://ehrl.ee/wp-content/uploads/2018/07/Hotels_The-Business-Case-for-Reducing-Food-Waste.pdf
- 77 Hilton, EMEA corporate communications. *Hilton Scales Up Green Ramadan Initiative in 2025, achieves 26% reduction in plate waste during the holy month*. 30 May 2025, amended by October 2026. <https://stories.hilton.com/emea/releases/hilton-scales-up-green-ramadan-initiative-in-2025-achieves-26-reduction-in-plate-waste-during-the-holy-month>
- 78 Hilton, EMEA corporate communications. *Hilton and Winnow Named World's Leading Sustainable Partnership 2025 by World Sustainable Travel and Hospitality Awards*. 15 January 2026. <https://stories.hilton.com/emea/releases/hilton-and-winnow-named-worlds-leading-sustainable-partnership-2025>
- 79 Hilton, APAC stories. *Serving Up Solutions: Hilton's Efforts in Reducing Food Waste and Reimagining a More Responsible Plate*. 2025. <https://stories.hilton.com/apac/hilton-honors/hiltons-efforts-in-reducing-food-waste>
- 80 Johnson Controls. *Johnson Controls helps Resorts World Las Vegas unlock \$110,000 in annual energy cost savings*. July 2026. [https://www.johnsoncontrols.com/media-center/news/press-releases/2026/07/24/johnson-controls-helps-resorts-world-las-vegas-unlock-\\$110000-in-annual-energy-cost-savings](https://www.johnsoncontrols.com/media-center/news/press-releases/2026/07/24/johnson-controls-helps-resorts-world-las-vegas-unlock-$110000-in-annual-energy-cost-savings)
- 81 Jena Tesse Fox, Hotel Management. *Hotels in AI pilot see labor gains, lower overtime costs*. 2 September 2026. <https://www.hotelmanagement.net/tech/actabl-shares-results-ai-based-labor-management-platform>
- 82 US Court of Appeals for the Ninth Circuit. *Gibson v. Cendyn Group, No. 24-3576, opinion*. 15 August 2025. <https://cdn.ca9.uscourts.gov/datastore/opinions/2025/08/15/24-3576.pdf>
- 83 US Court of Appeals for the Third Circuit. *Cornish-Adebiyi v. Caesars Entertainment, Inc., No. 24-3006, precedential opinion*. 29 July 2026. <https://www2.ca3.uscourts.gov/opinarch/243006p.pdf>
- 84 Ji C., Xu Y., Yu P., Zhang J. *Hotel revenue management field experiment with a synthetic control, Journal of Operations Management. Abstract consulted*. 2023. doi:10.1002/joom.1246 <https://doi.org/10.1002/joom.1246>
- 85 Let's Data Science, summarising a Lighthouse claim. *Independent Hotels Adopt AI Pricing Optimization*. 2026. <https://letsdatascience.com/news/independent-hotels-adopt-ai-pricing-optimization-90adb5f>
- 86 OpenAI. *OpenAI helps Hyatt advance AI among colleagues*. 20 April 2026. <https://openai.com/index/hyatt-advances-ai-with-chatgpt-enterprise>
- 87 Hotel Management. *HM on Location: Choice Hotels goes all-in on AI*. 7 May 2026. <https://www.hotelmanagement.net/tech/hm-location-choice-goes-all-ai>
- 88 Choice Hotels International. *Choice Hotels International Unveils New Technologies and AI-Powered Solutions to Help Owners Capture More Demand and Operational Excellence*. 7 May 2026. <https://media.choicehotels.com/2026-05-07-Choice-Hotels-International-Unveils-New-Technologies-and-AI-Powered-Solutions-to-Help-Owners-Capture-More-Demand-and-Operational-Excellence>

SOURCES, CONTINUED

- 89 Dillon E. W., Jaffe S., Immorlica N., Stanton C. T. *Shifting Work Patterns with Generative AI*. NBER. 17 November 2025. <https://arxiv.org/abs/2504.11436>
- 90 Brynjolfsson E., Li D., Raymond L. *Generative AI at Work*. NBER Working Paper 31161. 2023, revised November 2024. doi:10.3386/w31161 <https://arxiv.org/abs/2304.11771>
- 91 Hospitality Upgrade. *Key Themes and Insights From BLLA's Survey to Hotel Members 2026*. <https://www.hospitalityupgrade.com/magazine/summer-2026/key-themes-insights-from-bllas-survey-to-hotel-members-2026>
- 92 Salesforce and Minor Hotels, joint release. *Minor Hotels Unveils Global Data and AI Platform to Power Next-Generation Guest Experience*. 9 April 2026. <https://www.salesforce.com/ap/news/press-releases/2026/04/09/minor-hotels-unveils-global-data-and-ai-platform-to-power-next-generation-guest-experience/>
- 93 Noor Adatia, Hotel Dive. *Mews lays off 15% of staff in pivot to 'AI-native' future*. 8 July 2026. <https://www.hoteldive.com/news/mews-cuts-staff-ai-native-future/824687/>
- 94 GeekWire. *Expedia Group laying off 58 employees in Washington state in latest cuts at travel giant*. 22 September 2026. <https://www.geekwire.com/2026/expedia-group-laying-off-58-employees-in-washington-state-in-latest-cuts-at-travel-giant/>
- 95 Hilton Worldwide Holdings (Christopher Nassetta, Kevin Jacobs). *Q2 FY2026 earnings call, transcript via Bullfincher*. 2026. <https://bullfincher.io/companies/hilton-worldwide-holdings/earnings-call/fy2026-q2>
- 96 Accor SA (Sébastien Bazin, Martine Gerow). *H1 FY2026 earnings call, transcript via Yahoo Finance and Quartr*. 2026. https://finance.yahoo.com/quote/0H59.IL/earnings/0H59.IL-H1-2026-earnings_call-564366.html
- 97 DiamondRock Hospitality Company. *Q2 2026 earnings call, transcript via Earnings Whispers*. 31 July 2026. <https://earningswhispers.com/transcript/DRH/Q22026>
- 98 Bloomberg Law. *Las Vegas Union Scores AI, Daily Cleaning Wins in Caesars Pact*. November 2023. <https://news.bgov.com/safety/las-vegas-union-scores-ai-daily-cleaning-wins-in-caesars-pact>
- 99 Taylor Wessing. *KI als Arbeitsmittel: Warum die Mitbestimmung früh mitdenken?* June 2026. <https://www.taylorwessing.com/de/insights-and-events/insights/2026/06/ki-als-arbeitsmittel-warum-die-mitbestimmung-frueh-mitdenken>
- 100 Duetto. *Press releases and media contacts: Duetto to acquire FLYR Hospitality*. 8 October 2026. <https://www.duettocloud.com/news>
- 101 Sean O'Neill, Skift. *IHG Spent 8 Years Rebuilding Its Hotel Systems. Now It Says the Payoff Is Starting*. June 2026. <https://skift.com/2026/06/15/ihg-spent-8-years-rebuilding-its-hotel-systems-now-it-says-the-payoff-is-starting/>
- 102 Jenna Graber, Hotel Dive. *Marriott CIO talks enterprisewide AI deployment strategy*. 18 May 2026. <https://hoteldive.com/news/marriott-cio-talks-enterprisewide-ai-deployment-strategy/820467/>
- 103 Dustin Stone, Hotel Technology News. *Choice Hotels Moves AI Technology Beyond Pilot Projects and Into the Core of Hotel Operations*. 25 April 2026. <https://hoteltechnologynews.com/2026/04/choice-hotels-moves-ai-technology-beyond-pilot-projects-and-into-the-core-of-hotel-operations/>
- 104 Google for Developers. *Google Universal Commerce Protocol (UCP) for Lodging*. undated. <https://developers.google.com/hotels/ucp>
- 105 Hilton Franchise Holding LLC. *2025 US Hilton Franchise Disclosure Document, issuance date 30 March 2025*. <https://hmd-wp.go-vip.net/wp-content/uploads/2025/03/2025-US-FDD-Hilton.pdf>
- 106 TechCrunch. *A hotel check-in system left a million passports and driver's licenses open for anyone to see*. 15 May 2026. <https://techcrunch.com/2026/05/15/a-hotel-check-in-system-left-a-million-passports-and-drivers-licenses-open-for-anyone-to-see/>
- 107 Vilius Petkauskas, Cybernews. *Hacker employs Claude to breach booking firms, leaves millions of records publicly accessible*. 23 June 2026. <https://cybernews.com/security/claude-ai-exploited-breach-hotel-booking-platforms/>
- 108 Colorado General Assembly. *SB26-189 Automated Decision-Making Technology, signed 14 May 2026*. <https://leg.colorado.gov/bills/sb26-189>
- 109 RapidEye. *Best AI Hotel Room Inspection Software (2026)*. 2026. <https://rapideyeinspections.com/blog/best-ai-hotel-room-inspection-software/>
- 110 OSU NLP Group et al. *An Illusion of Progress? Assessing the Current State of Web Agents (Online-Mind2Web)*. COLM 2025. <https://arxiv.org/abs/2504.01382>
- 111 Yutori. *OSWorld-Verified Leaderboard, aggregating official and self-reported results*. undated. <https://yutori.com/leaderboards/osworld-verified.md>
- 112 Voicebot.ai. *Josh.ai Brings Privacy-Focused Smart Home Ecosystem to Kimpton Rowan Hotel*. 8 September 2021. <https://voicebot.ai/?p=23836>
- 113 Origin of Bots, reporting a Relay Robotics claim. *Relay Robotics Passes 1.5 Million Deliveries as Hospital and Hotel Deployments Expand Globally*. 13 May 2026. <https://www.originofbots.com/news/relay-robotics-passes-15-million-deliveries-as-hospital-and-hotel-deployments-expand-globally>
- 114 Turunen, Tuunainen, Liu. *Working with a Service Robot: Case 'Kalle' the Robot in Hotel Hanaholmen. HICSS-58. Abstract consulted*. January 2025. doi:10.24251/hicss.2025.072 <https://doi.org/10.24251/hicss.2025.072>
- 115 LG Electronics USA newsroom. *LG Launches Commercial Robotic Vacuum Cleaner for Hotels*. 2 April 2025. <https://www.lg.com/us/newsroom/b2b/lg-launches-commercial-robotic-vacuum-cleaner-for-hotels>
- 116 McLaren Technologies via Hotel Online. *Hyatt Regency Sydney Elevates Cleanliness With Cutting-Edge Phantas Cleaning Robots*. 27 November 2024. https://www.hotel-online.com/press_releases/release/hyatt-regency-sydney-elevates-cleanliness-with-cutting-edge-phantas-cleaning-robots/
- 117 Asia Business Daily. *Lotte Hotel Becomes First in Industry to Join Government-Led Humanoid Development Project*. 16 January 2026. <https://view.asiae.co.kr/en/article/2026011610290909914>
- 118 bne IntelliNews. *Slovenia's Vandri Robotics unveils humanoid hotel receptionist Jo-E at MWC Shanghai 2026*. <https://www.intellinews.com/slovenia-s-vandri-robotics-unveils-humanoid-hotel-receptionist-jo-e-at-mwc-shanghai-2026-451491/>
- 119 Hotel Technology News. *China Plans First Fully Robot-Operated Hotel Powered by AI and Robotics*. 2 July 2026. <https://hoteltechnologynews.com/2026/07/china-plans-first-fully-robot-operated-hotel-powered-by-ai-and-robotics/>
- 120 The Verge. *Japan's robot hotel lays off half the robots after they created more work for humans*. 15 January 2019. <https://www.theverge.com/2019/1/15/18184198/japans-robot-hotel-lay-off-work-for-humans>



A WRITTEN ENQUIRY, IF USEFUL

Which keys has your hotel already handed over?

Most owners and operators have switched on more AI than they have decided on. [OUTLOOK](#) If you want to map it for your own hotels, describe the situation in a few lines through the Cross-Point website: your hotels, the systems you know are running, and the question that matters to you. Every enquiry receives a personal written reply, with a proposed next step where one fits.

Confidential and without obligation.

giacometti-consulting.com

Companion files, the evidence ledger and *The Invisible Shortlist* are on the same site, run by Riccardo Giacometti GmbH, trading as Cross-Point.

ABOUT THE AUTHOR

Riccardo Giacometti founded Cross-Point in Zug after more than thirty years in senior luxury hotel leadership. He advises hotel owners and operators on strategy, AI adoption and organisational design. This is the second report in the Cross-Point outlook series, after *The Invisible Shortlist*.

Riccardo Giacometti
Cross-Point · Riccardo Giacometti GmbH
Zug, Switzerland

Who Holds the Keys? Twelve hotel AI trends for 2027. Evidence current to 9 October 2026. General information only; not investment, legal or compliance advice.