



Executive
Perspectives

AI Disruption in Hospitality

Building an AI-First Hotel Company

March 2026

Introduction

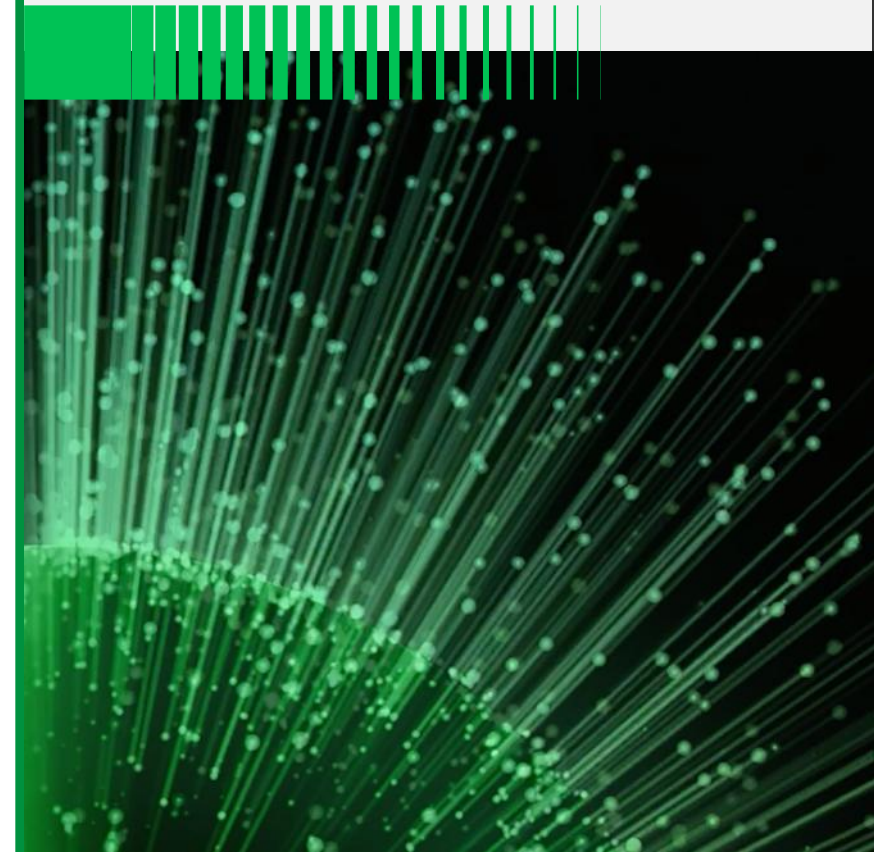
We meet often with CEOs to discuss AI—a topic that is both captivating *and* rapidly changing. After working with more than 2,000 clients over the past two-plus years, we are **sharing our most recent insights in a new series designed to help CEOs navigate AI**. With most sectors going through major shifts, the focus in 2026 is on how to leverage AI to **fully transform organizations** and create **new sources of competitive advantage**.

In this edition, we discuss the future of hotels and the role AI will play in turbocharging growth. We address key questions on the minds of executives:

- How can AI reshape competitiveness in the hospitality industry?
- What does an AI-first hotel look like? What is the opportunity at stake?
- What are sector leaders doing differently, and how are they using AI solutions to accelerate their transformation?
- What pragmatic steps should I take to scale impact?

This document is a guide for hotel executives to cut through the hype around AI and understand what creates value now and in the future.

In this BCG Executive Perspective, we articulate the vision and value of building an AI-first hotel company



Executive summary | Transforming to an AI-first hotel company

WHY now is the right time to act

- Hotel brands, management, and owners have been **confronting emerging pressures in hospitality**: distribution shifts, labor shortages, a growing cost base, and shifting guest expectations
- The **hospitality industry is already adopting AI**, with about 25% of companies scaling AI and roughly 8% using AI to build for the future
- Additionally, shifting stakeholder expectations mean that hospitality players cannot choose to opt out of AI; how players choose to adopt this technology **will determine the winners and losers of the future**

WHAT an AI-first hotel looks like

- While AI is already helping hotel companies make meaningful strides in some commercial and operational functions in the value chain, maximizing impact relies on three cross-functional pillars of radical innovation:
 - **Commercial Excellence at Scale**: AI-optimized discovery, distribution, loyalty, and pricing to drive higher visibility, conversion, upselling, and retention in the AI-driven distribution funnel
 - **Unparalleled Cost Advantage**: Achieve lower cost per room key by using automation, robotics, and agentic AI; when deployed effectively, these tools increase efficiency, optimize resource use, and minimize waste
 - **Supercharged Development**: AI accelerates design, construction, and project management to cut timelines, enable faster openings and renovation cycles, and build capital-efficient portfolios

HOW to start the journey to become an AI-first enterprise

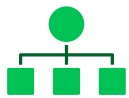
- Yet **adoption is slowed by key risks and structural barriers**, including fragmented ownership models among owners, operators, and brands; siloed systems and data; unclear ROI potential; staff resistance to change; and limited trust in AI; without deliberate action, hotels risk tinkering around the edges rather than capturing the full value of AI at scale
- **There are key actions hospitality players can take today** to win in the AI future: prepare your technology and data; reshape your digital presence to foster AI-driven discovery and distribution; leverage customer data to drive loyalty and avoid disintermediation; prioritize high-ROI workflows to improve property economics; and upskill teams and partners

Brands, management, and owners face different challenges, but since many groups play multiple roles across portfolios, these often overlap



Hotel brands

- **Diluted Brand Identity:** Travelers increasingly make choices on the basis of price, location, or reviews rather than loyalty to a brand or chain
- **Distribution Shifts:** Online travel agencies (OTAs) and direct-to-consumer platforms retain influence in discovery and conversion (about 40% of bookings), compressing margins for brands and independents and diluting direct relationships
- **Innovation Gap:** Enterprise rollouts are slowed by legacy and fragmented stacks; some nimble independents or startups move faster; OTAs—digital first—are outpacing brands in AI development and partnerships



Hotel management

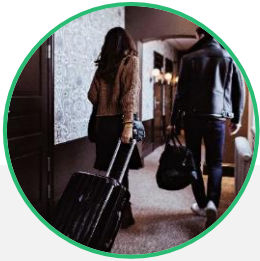
- **Labor Shortages:** Hiring, retention, and retraining challenges lead to quality inconsistencies as about 70% of hotels reported staffing shortages
- **Stack Complexity:** Running diverse hotel portfolios with fragmented tech stacks create data silos and manual workarounds that raise costs
- **Shifting Guest Expectations:** Travelers expect personalization, visible sustainability practices, and a frictionless experience across every touch point



Hotel owners

- **P&L Pressure:** Inflation, higher interest rates, and rising operating costs (especially labor costs) squeeze network operating income (NOI) and defer capex investments
- **Capex Backlog:** Aging properties and outdated systems require upgrades, but owners hesitate without clear ROI
- **Underwriting Volatility:** Uneven demand recovery and geopolitical uncertainty create risks for long-term investments

Additionally, shifting stakeholder expectations means that hospitality players cannot choose to opt out of AI



Customers

37% of customers **already use large language models (LLMs) to assist in trip planning**; they will gravitate to hotels that are visible, expecting tailored recommendations and frictionless stays



Partners

OTAs and distribution partners are embedding AI into discovery; hotels that don't integrate risk losing direct booking share or becoming invisible to guests



Owners

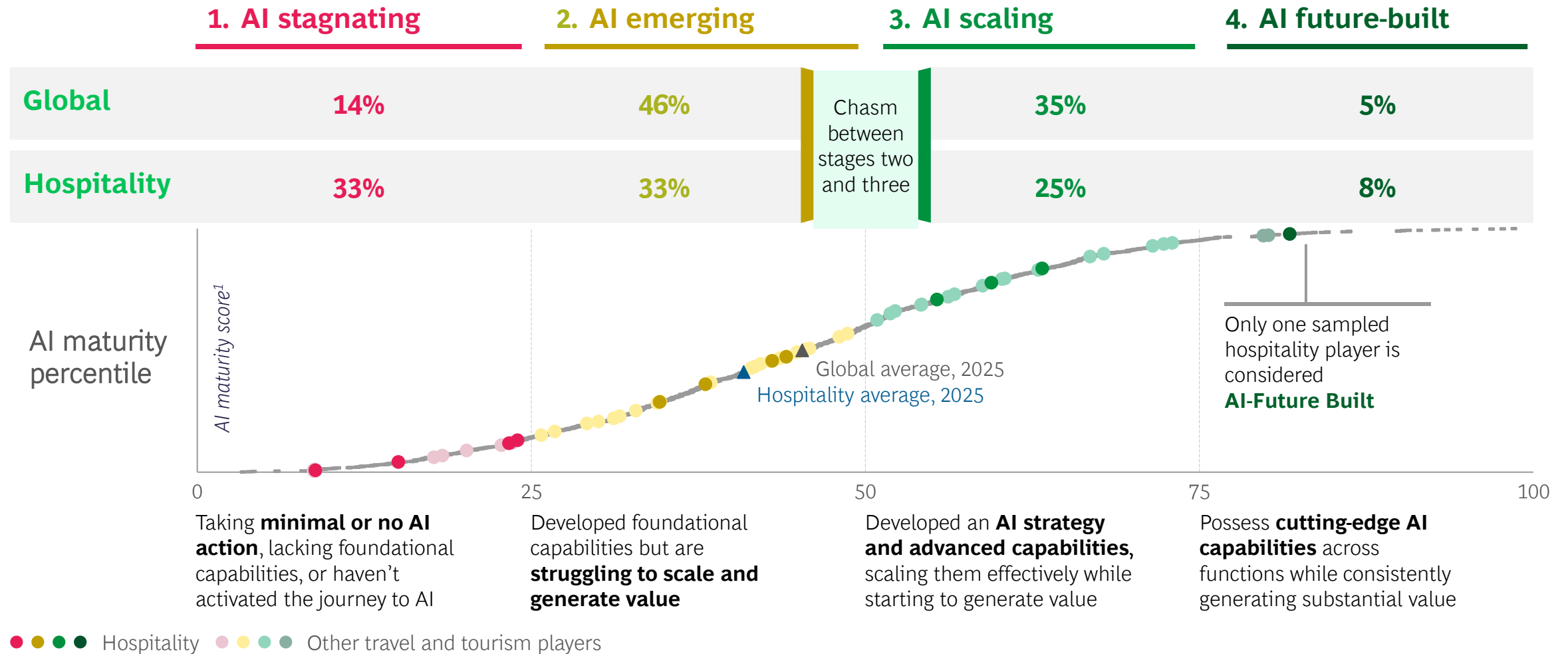
Real estate investment trusts that are investing in and renovating assets must leverage AI in investment decisions and integrate **smart property management and the Internet of Things (IoT)** to optimize resources, maintenance, and costs



Workforce

The industry is facing significant labor shortages; hotels must leverage AI to **enhance productivity, reduce costs, and prioritize guest service** (vs. administrative work) while complying with evolving labor legislation

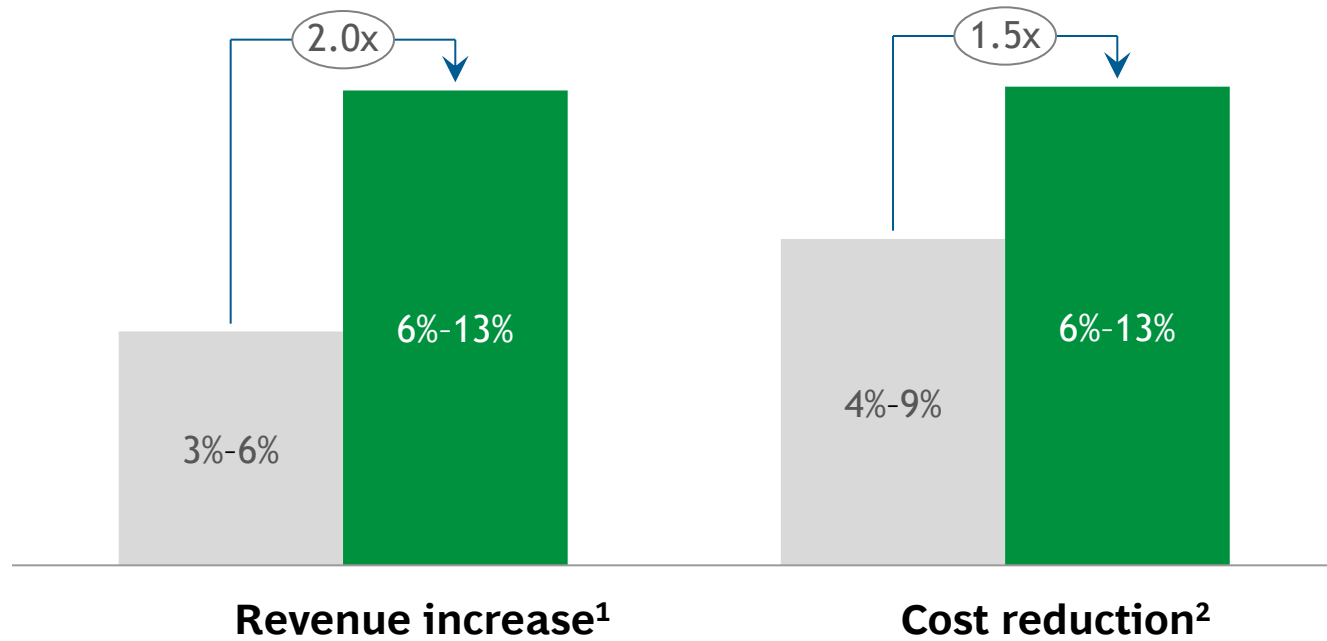
About 25% of hospitality companies are scaling AI, and roughly 8% are considered AI-future built—but the industry trails the global average



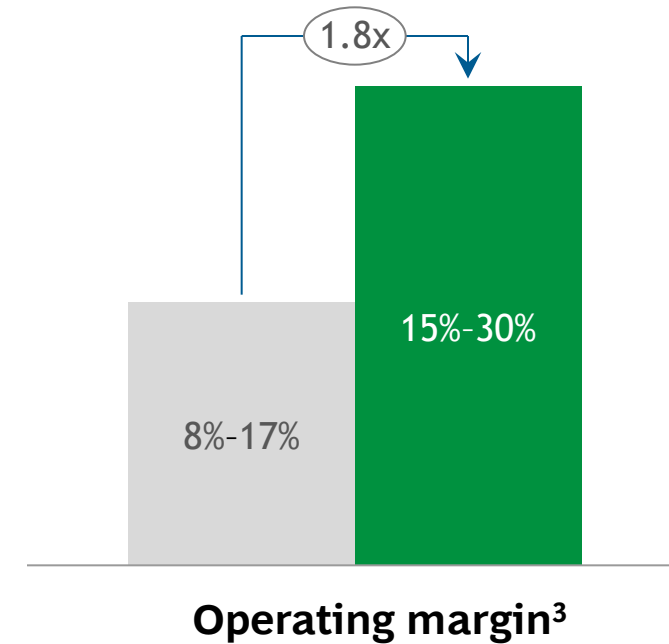
1. Maturity is assessed through 41 dimensions.
Sources: BCG Build for the Future 2025 Global Study (n=1,250, n=12 for hospitality, n=59 for travel and tourism overall); BCG analysis.

Hospitality AI leaders are expected to reap higher financial value compared with other players

AI leaders expect to see higher revenue and increased cost savings through AI efficiencies vs. laggards



AI leaders have the potential to expand their operating margin by ~2x

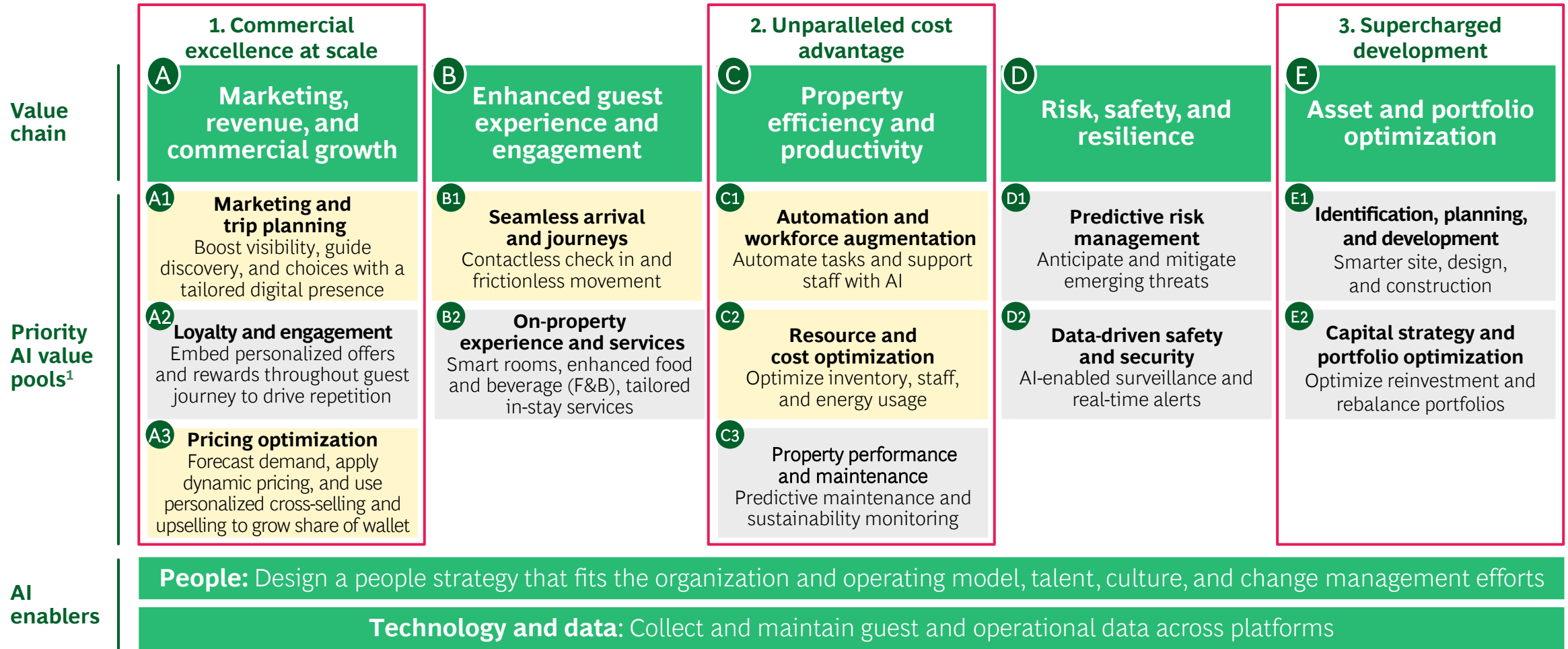


■ AI laggards ■ AI leaders

1. What percentage of revenue growth did you achieve/project in 2025 and 2028 (in percentage of annual revenue) through AI efficiency gains? 2. What percentage of cost reduction did you achieve/project in 2025 and 2028 (in percentage of total operating expenses) through AI efficiency gains? 3. Leading asset-light brands generate an operating margin of about 55% to 60% today; projections based on this ratio for the purposes of this exercise; ranges defined to be between 50% to 100% of expected value.

Sources: BCG Build for the Future 2025 Global Study (n=1,250; n=21 for rail and hospitality); BCG analysis.

AI unlocks opportunities for hospitality players to enhance processes and operations across the value chain

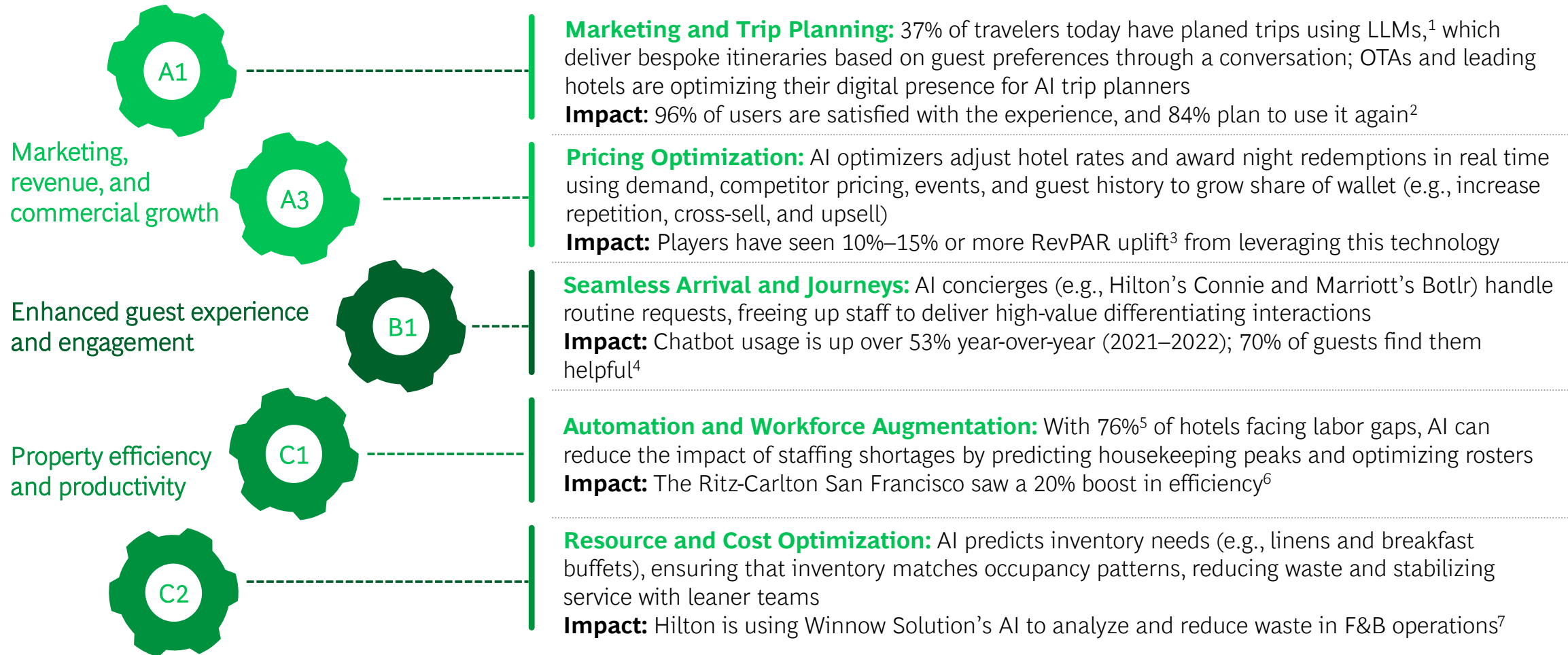


Key

- Established AI adoption:** AI enhancement is happening; proven ROI
- Early-stage AI adoption:** Some movement; next wave of AI enhancement
- Transformational AI adoption:** AI innovation is at the core of the AI-first hotel company

1. Not an exhaustive list.
Source: BCG analysis.

There are five established value pools where AI-leading hotels have already made progress



1. Skift 2025 Travel Outlook 2. Kaspersky Survey; 3. STR; 4. Hotelier Technology Sentiment 5. AHLA; 6. EHL 7. Triple Pundit
Source: BCG analysis

However, to truly transform to an AI-first hotel and outpace incumbents, it is critical to implement the three pillars of disruption

1

Commercial excellence at scale

AI-optimized discovery, distribution, pricing, and loyalty to drive higher visibility in search, smarter upselling, and stronger customer retention

2

Unparalleled cost advantage

Lower cost per room key by using automation and robotics to reduce manual work, while AI-driven back-end optimization streamlines staffing, reduces waste, and enables hotels to do more with less

3

Supercharged development

AI-powered design and construction will drastically cut timelines, enabling faster openings, quicker refresh cycles, and building a capital-efficient portfolio that grows ahead of the market

An **AI-first hotel company**—unconstrained by legacy processes, operations, and assets—may prioritize one or more pillars depending on its positioning and objectives

Transformation #1 | The AI-first hotel redefines discovery, pricing, and loyalty, fostering commercial excellence through AI-optimized content

Vision

Guests won't scroll through OTAs, price comparison sites, and hotel websites. They'll **tell their digital assistant what they want—and receive a curated stay**, perfectly matched to their lifestyle, preferences, and routines.

The **AI-first hotel company** brand will exist where the real decisions are made—inside **algorithms**. Every attribute will be **machine readable**, and every price will be dynamically tuned to demand. **Loyalty** of the future will be embedded into guests' personal AI assistants; instead of tiered rewards, guests will have hyper personalized add-ons tailored to their **guest DNA**.

Sources: Hospitality Net; BCG analysis.

Key actions to unlock vision

A1 Marketing and trip planning

OTAs could maintain their position as an aggregator (of rates, inventory, amenities, and payments), feeding the interfaces to **agentic AI tools** to handle the process end to end, or OTAs could be eliminated, as AI pulls inventory directly from **global distribution systems (GDS)**

Monetization to shift from pure OTA-commission models to an agentic AI distribution commission based on referral commission, sponsored answers, embedded recommendations, and bids for higher placement

Hotels to boost visibility through their digital footprint:

- Write **brand and property information to be machine readable and optimized for generative engines** across Google, Tripadvisor, OTAs, and social media
- **Feed information as structured data** (APIs and schemas) into consumer AI to maintain an accurate view of room inventory and hotel attributes
- **Foster and amplify user-generated content** (e.g., from influencers and Reddit communities) and guest reviews as AI algorithms heavily weight reputation signals

A2 Loyalty and post stay engagement

Integrate loyalty programs into the new ecosystem (e.g., Marriott Bonvoy linked to a digital assistant) for AI to prioritize hotels where a guest can receive members-only perks and maximize the usage of their loyalty currency

A3 Pricing optimization

Next-generation demand intelligence and dynamic pricing to program distribution in real time, assessing key factors to refine rates and update length-of-stay rules to maximize returns:

- **Internal and property factors** (e.g., occupancy and inventory)
- **Demand factors** (competitor's rates, booking pace, airlift, trends, and sentiment)

Transformation #1 | There are three potential scenarios for AI to redesign hotel distribution

Likelihood

High

Low

Scenario 1

LLMs partner with OTAs

Scenario 2

LLMs partner directly with GDS

Scenario 3

LLMs go direct to brands

Description

- **LLMs partner with OTAs** that provide consolidated inventory, reviews, and pricing (sourced mostly from GDS)
- **LLMs act as the new discovery layer**, capturing part of the search profit pool (shifting from Google as the classic search engine)

- **LLMs bypass OTAs, pulling inventory directly from GDS** or new aggregators (e.g., Selfbook)
- **OTAs could attempt to launch their own LLMs**, but they are likely to struggle to match the scale, sophistication, and data integration of existing tech players (e.g., OpenAI, Perplexity, and Anthropic)

- **LLMs source directly from brands** through structured content, rich attributes, and open APIs
- **High compute costs of aggregating** across many brands may limit feasibility in the near term

Potential implications for hospitality players

- **Profit pools are largely stable across OTAs and GDS**, but search profits gradually move to LLMs
- **Spending shifts from search engine marketing to LLMs** (depending on when and how the monetization model is defined)
- **Value of brand is weakened** as LLMs can pull reviews and details from third-party websites, giving relevance to boutique players; maintain brand relevance through loyalty perks tailored to guests

- **OTAs face existential pressure**
- **GDS' profit pool is stable** by charging LLMs for inventory access
- **LLMs capture both search and OTA profit pools**, but **fragmentation and low marginal costs** could lead to price pressure, ultimately benefiting brands with lower distribution costs
- **Value of brand is weakened** since LLMs can pull reviews and details from third-party websites, giving relevance to boutique players; maintain brand relevance through loyalty perks tailored to guests

- Intermediaries are disrupted, with more **value shifting to brands**
- **Data accessibility becomes prerequisite:** only brands exposing APIs and AI-ready content will appear in LLMs
- **Loyalty integration becomes decisive:** LLMs will lean on loyalty data (status tiers, points, and member-only benefits) to personalize recommendations, driving a disproportionate share to brands with strong loyalty programs

Transformation #2 | The AI-first hotel has a fully automated back office to streamline operations and minimize costs

Vision

Every operation—from scheduling to procurement—will be **automated or optimized**. AI will forecast demand to flex rosters, restock supplies before they run out, and tune energy use to occupancy in real time, **slashing waste, boosting margins, and hardwiring resilience**.

The AI-first back office will be **invisible to guests, predictive for managers, and structurally leaner** than any competitor. For **budget** hotels, this unlocks superior margins, powered by automation and gig workers delivering reliable service at the lowest cost. For **luxury** hotels, it frees staff from administrative tasks, giving them the time and insight to craft authentic, unforgettable experiences.

Sources: Hospitality Net; BCG analysis.

Key actions to unlock vision

C1 Automation and workforce augmentation

Automate operations, leveraging agentic AI to sequence, coordinate, and solve any issue (e.g., real-time decision support for upgrade eligibility and AI-drafted guest communications)

Deploy robots to handle or assist with AI-assigned routine services (e.g., restocking minibars, transferring luggage, cleaning common spaces, and delivering towels)

C2 Resource and cost optimization

Install IoT sensors to track real-time consumption and inventory

Integrate agentic AI into procurement to automatically trigger replenishments and schedule rosters based on forecast demand

- To manage peaks (e.g., conferences, events, and seasonal surges), leverage agentic AI to screen and confirm **gig workers with the right skill set** to support operations

C3 Property performance and maintenance

Build high-fidelity digital twins of each property to forecast energy usage, guest flows, required staffing, and revenue projections in real time

Through agentic AI, **detect anomalies, propose fixes, and execute changes** (e.g., adjusting heating, ventilation, and air conditioning loads, rebalancing staff schedules, and managing security and safety), maximizing both profit and sustainability

Across all use-cases

Leverage an AI-powered ecosystem, providing real-time visibility into on-property operations, to **centralize functions** (e.g., finance and HR) at the regional and headquarters levels

Deploy AI and robotic process automation to supercharge manual tasks, maintain accurate, real-time views of the properties, decide prices, and implement best practices

Transformation #3 | The AI-first hotel company uses generative design and advanced construction tech to deliver faster openings and renovations

Vision

The new properties of the AI-first hotel company will no longer be announced years in advance and trapped in multiyear development timelines and static designs.

In **days**, GenAI will design it—flawlessly aligned with brand and chain standards. In **months**, robotics, modularity, and 3D printing will complete its construction. Renovations will be continuous, fast, and fluid—with **spaces reconfigured as guest expectations evolve**.

No longer a constraint, development becomes a **competitive weapon**—enabling the AI-first hotel company to scout the best locations, stay perfectly in sync with demand, and always a step ahead of the market.

Sources: ICON Technology; Cove; BCG analysis

Key actions to unlock vision

E1 Identification, planning, and development

Deploy generative design platforms to create and stress-test thousands of layouts in days, optimizing for guest flows, revenue potential, and sustainability outcomes

Automate construction document processing, compliance controls, and change detection, creating structured project databases to maintain oversight and detect and prevent deviations (e.g., a significant cost increase)

Deploy AI-powered project management to optimize workforce and supplier scheduling (factoring in weather and availability) and use computer vision to track real-time progress against the plan

Adopt modular construction to manufacture and assemble units in parallel, reducing build times by 20%–50%, labor intensity, and waste

Deploy autonomous and semiautonomous machines to automate site tasks (e.g., material handling and finishing), improving safety and execution speed

E2 Capital strategy and portfolio optimization

Accelerate portfolio growth and boost internal rate of return by speeding up opening timelines, shortening renovations and payback periods

Assess potential new opening sites using predictive analytics (e.g., assess travel demand, economics, and competitors) to reduce bad bets and make data-driven investment decisions

Maintain portfolio relevance by **adapting to changing guest trends** (vs. having to make investments with a decade-long horizon)

Enabler: People | To support AI deployment at scale, players must review the people strategy for their organization, talent, and culture

Organization and operating model

Emergence of new roles and departments

New roles will be created to unlock the potential of AI at the central and property levels (e.g., chief AI officer)

New operating models

Changes in roles, responsibilities, and decision rights would bring about significant changes in operating models

Greater productivity and redesigned work

GenAI will automate many types of creative work (e.g., marketing content) and enhance employee support (e.g., next-best action)

Talent and skills

Changing skill set requirements

GenAI will automate some tasks, recommend next actions, and improve knowledge management across the organization

Revamped talent acquisition

Greater access to candidate pool web scraping, automated scheduling, and AI-based interviewing would greatly increase hiring efficiency

AI-enabled performance management

New observational data (e.g., conversation summaries) will make performance management more objective

Personalized training

Employee learning and development will be tailored to individual needs and questions, and new training content around AI will emerge

Culture and change management

Evolving organizational culture

Culture will foster experimentation and data-driven decision making, brought to life by role modeling and target behaviors

Empowered and AI-ready leadership

Leaders are aligned, motivated, and supported to deliver on change management objectives at both the property and central levels






Accelerated change management needs

New talent needs, ways of working, and job responsibilities are necessary for people to believe in the vision and be equipped to make it happen

Note: Not an exhaustive list.

Source: BCG's Marketing Organization and Operations Benchmarks.

Enabler: Technology and data | To deploy AI at scale, hotels need to evaluate their data strategy and start building the foundation to unify guest identity

| Priority action | Description | Impact | Effort |
|---|--|--|--|
| Define clear data strategy and governance | <ul style="list-style-type: none"> Establish an AI use-case backlog (value and feasibility) Assign data and AI product owners Assign responsibilities and decision rights Define success metrics | <ul style="list-style-type: none"> Align investment to outcomes Ensure clear accountability Promote faster decision making |  Medium effort but foundational; defines governance and operating model |
| Unify guest identity and create customer data platform | <ul style="list-style-type: none"> Build a master guest profile across loyalty programs, property management system (PMS) and central reservation system (CRS), website and apps, call center, Wi-Fi, and any other on-property systems as a single source of truth about the guest Enable real-time profile updates | <ul style="list-style-type: none"> Obtain a single, consolidated guest view Provide a consistent guest experience across properties and channels Identify personalization opportunities |  Heavy lift; requires a data overhaul across all platforms and systems |
| Build data lakehouse platform¹ for customer and operations data | <ul style="list-style-type: none"> Set up cloud storage for cost effectiveness and scalability Structure data using metadata and open table formats to ensure consistency when multiple users access and modify data simultaneously | <ul style="list-style-type: none"> Set up a scalable, cost-efficient, single source of truth for any analytics and machine language tool deployment |  High effort and foundational; defines core analytics across platforms and systems |
| Maintain data quality and master data | <ul style="list-style-type: none"> Implement automated quality checks, anomaly detection, and survivorship for guest, property, room, and rate master data | <ul style="list-style-type: none"> Maintain accuracy and trust in data |  Medium effort; requires process discipline |
| Collect and retain privacy and consents | <ul style="list-style-type: none"> Centralize consent capture and enforcement Define purpose-based access Automate data subject requests (e.g., access, deletion, and opt out) Define and implement retention and minimization policies | <ul style="list-style-type: none"> Ensure regulatory compliance Build customer trust in AI |  Low effort but high compliance risk |
| Design API gateway and interoperability | <ul style="list-style-type: none"> Expose domain APIs (guest, reservations, inventory) via API gateway Replace file drops with webhooks and streaming to provide LLM with real-time inventory and rate access | <ul style="list-style-type: none"> Enable faster integration across PMS, CRS, and customer relationship management (CRM) and loyalty programs Prepare for AI tool use |  Medium to high effort depending on tech stack; required for AI-first interface |

1. A data lakehouse platform is a modern data architecture that combines the cost-effective storage and flexibility of a data lake with the data management and performance of a data warehouse.

Note: Not an exhaustive list.

Source: BCG analysis.



Despite the hype, hospitality still faces key risks and structural barriers hindering AI adoption

Fragmented systems (e.g., PMS, CRM, F&B) can require more than 100 APIs to integrate, and **guest records** (especially those coming from OTAs) are often incomplete or inconsistent, resulting in each department having a different version of the guest given the absence of a comprehensive **customer data platform**

The investment dilemma of choosing foundational tasks (e.g., guest record cleanups or data standardization) whose benefits may lag three to six months vs. chasing visible innovations with predictable ROI (e.g., renovation), impacts their future ability to deploy AI at scale

Staff often resist AI, perceiving it as a threat: meaningful change management is required to position it as an empowerment opportunity and specific training is necessary to ensure talent readiness (only 2.9% of travel and tourism full-time equivalents have AI skills in 2025)

Limited trust in AI, with only 2% of travelers being comfortable handing decision making to AI, due to generic or outdated suggestion and privacy concerns; need to position AI as augmenting, not replacing, the trust and authenticity guests expect from human service







What the experts are saying

- “The industry is **slow to adapt to technology** and relying heavily on gut decision making.” – FLYR Hospitality
- “AI does so well in manufacturing sector because there is **no ambiguity or misnaming things**. It takes off in places with **clean data**. Hotels do not have clean data.” – The Wilmington Group
- “Buying a license for every employee over 10k properties is not cheap, and we have **not found a business case** yet that proves it’s worth the investment.” – Amadeus Hospitality
- “Legacy hotels have **ingrained systems**, and no one wants to go through the pain of a renewal.” - Cloudbeds
- “Personalization depends **on how much data the guests are willing to share**. They must feel safe sharing data and ensuring privacy is important.” – Sabre

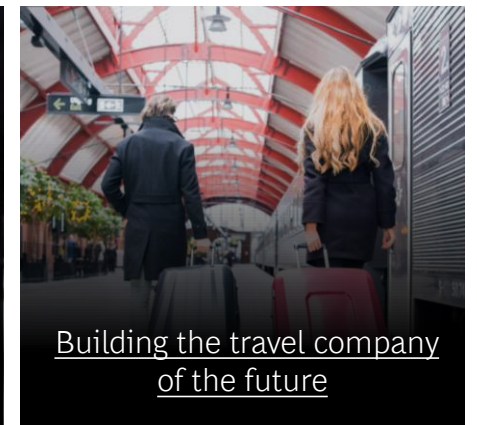
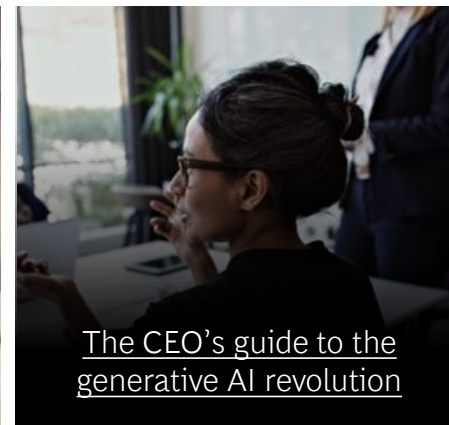
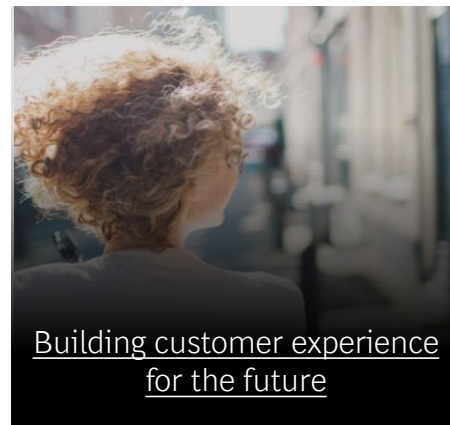
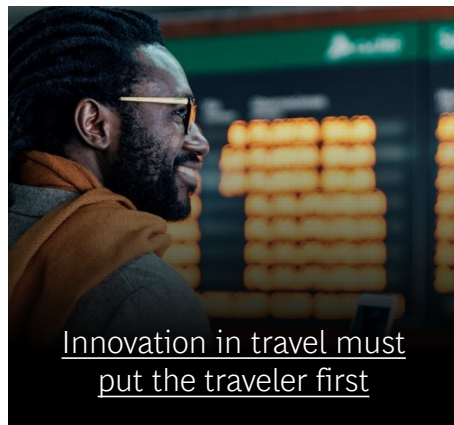
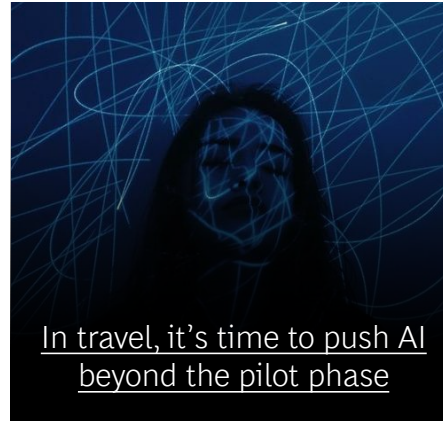
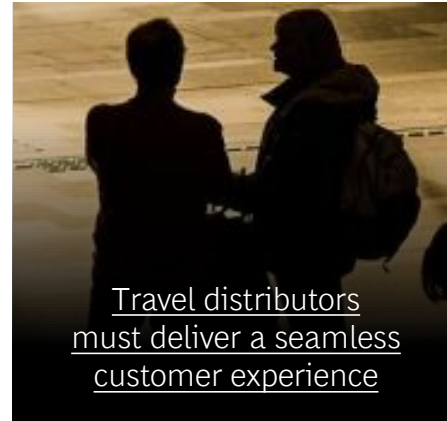
Summary | Key actions across pillars and enablers for hospitality players to climb the AI maturity curve

| | | Move up to scaling Develop an AI strategy, advance AI capabilities, and scale AI effectively | Move up to future-built Advance to the forefront of AI innovation and cutting-edge AI capabilities for substantial value |
|---|---|---|--|
| 1 Commercial excellence at scale | Improve discoverability by reshaping digital presence and distribution [highest priority] | <ul style="list-style-type: none"> Redesign brand and property content to be AI ready by creating structured and machine-readable assets that LLMs can easily surface (answer engine and generative engine optimization) Learn from AI prompts to improve offering and presence, highlighting authentic brand assets (e.g., local partners) Audit digital content to ensure consistency between online representation and on-property experience Often regarded as the highest priority task, as it's critical to protect occupancy and pricing power | <ul style="list-style-type: none"> Optimize own domains (e.g., website tailored to how users ask questions and multiple versions for multiple users) Feed real-time structured data Expand third-party presence and partnerships Connect digital authenticity to operations delivery, using AI insights to help on-property teams to overdeliver Track guest experience alignment with digital storytelling |
| | Unlock loyalty through data | <ul style="list-style-type: none"> Create and update centralized guest DNA to identify and act on patterns, unlocking segment-of-one personalization, increasing engagement, and avoiding disintermediation | <ul style="list-style-type: none"> Build an AI-first loyalty engine, with AI agents adapting offers and content based on guest, leveraging real-time context data across any multimodal interaction |
| 2 Unparalleled cost advantage | Improve property economics via AI-first operations | <ul style="list-style-type: none"> Critical for brands to improve property economics; implement AI in high ROI workflows (e.g., staff optimization) | <ul style="list-style-type: none"> Scale workflows that unlock P&L impact across functions Design end-to-end AI-first business functions (e.g., fully AI-managed maintenance) |
| 3 Supercharged development | Embed AI into development efforts | <ul style="list-style-type: none"> Test AI-led site evaluation alongside traditional feasibility Use generative design tools to model layouts and sustainability options Embed AI copilots to flag cost and schedule risks early | <ul style="list-style-type: none"> Deploy modular and advanced construction technologies and AI-first program management at scale to cut timelines and costs (e.g., generative design, autonomous project management, and end-to-end digital twin integration) |

Getting started | Six steps for executives to set their hotel company on an AI-first path

-  **Set the North Star** by determining what you're solving for, which competitive advantages to strengthen, and which guest expectations and shifts to anticipate
-  **Align governance, resourcing, business, and technology efforts to a few game changers**, and preserve space for bottom-up innovation and experimentation
-  **Adapt tech strategy for agility** by integrating the tech stack across levels (group, brand, and property) and ensuring guest and operations data readiness to deploy AI at scale
-  **Set up a focused AI delivery office** by anchoring the AI program in a brand-group level delivery team that works across property operations and central departments (e.g., revenue)
-  **Anticipate medium-term impacts** by planning for changes to organization design, talent strategy, and competitive dynamics as AI scales
-  **Drive cultural change** by shaping new behaviors and mindsets through leadership posture and organization-wide upskilling

Read more about BCG's insights in hospitality, travel, and AI



BCG Experts | Key hospitality contacts for AI transformation



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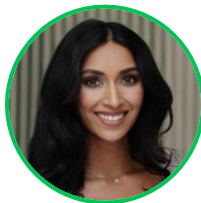
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Academic Experts | Key partners for AI transformation in Hospitality



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