

From Tech Stack to Performance Stack

How connected technology, data and AI are reshaping hotel performance

EXPLORE TECH

Six connected stages. One Performance Stack.

RESEARCH PARTNERS

access evo Hospitality · adyen · amadeus · BENCHMARKET · Cendyn · Eleanor · Fairmas · Shiji

Prepared by ExploreTECH | Research Partner insight across the hotel business

The Performance Stack

ExploreTECH is an independent technology decision platform. This paper connects eight Research Partner perspectives.

01 **Building the connected foundation**
Systems, operational records and transactions

02 **Winning demand in a changing landscape**
Discovery, visibility and profitable demand

03 **Connecting the guest journey**
Context across departments and touchpoints

04 **Improving operational and financial performance**
Productive staff time and stronger control

05 **Turning data into decisions**
Reporting, prediction, recommendation and action

06 **Measuring the return**
Commercial, operational and owner outcomes

What changes when the systems work together?

The paper follows information from the underlying architecture to the guest relationship, operating decisions and owner return. Each stage combines relevant partner arguments with evidence and a shared industry question.

How to read the evidence

Customer outcomes, survey findings and investment intentions answer different questions. Read the scope beside each figure before comparing returns.

ExploreTECH / The investment question. Which connection changes revenue, cost, cash flow, guest service or asset productivity, and how will the hotel establish the result?

Building the connected foundation

A common foundation needs to connect systems, operational records and the transactions moving through them.

SHIJI

The legacy of isolated decisions

The biggest barrier to a connected hotel technology ecosystem is not a lack of technology, but years of technology decisions made in isolation. Hotels have traditionally added systems to solve specific operational needs, often creating disconnected environments across PMS, F&B, guest engagement, payments, and analytics. As portfolios grow, maintaining consistent processes and data becomes increasingly difficult. In our experience, the challenge is less about integration itself and more about establishing a trusted, shared data foundation that allows systems to work together. A recent group-wide migration of more than 100 hotels onto a single PMS highlighted the scale of change required to standardize data, operations, and technology across a large organization. [9]

LOUISE HIBBERT

Business Development Director MEA
Access Hospitality

The hidden cost of handoffs

Hotels have rarely lacked technology. They have lacked connected technology. Most systems are bought to solve one problem well: rooms, rates, rotas, payroll, invoices. Each arrives with its own data model, login and reporting view, so the same guest or booking has to be keyed, checked and reconciled across several screens.

The business case rarely prices those handoffs, so the cost stays hidden in front-office and back-office hours. Workarounds then become routine. The problem persists because the time loss is spread thinly across many people, and no single budget line owns it.

DAUMANTAS GRIGARAVICIUS

Head of Middle East, Adyen

The transaction follows the same fragmented path

The biggest challenge for hotel groups is that payments often happen across systems that don't communicate with each other. A guest might book a room online, pay for dinner at a restaurant and visit the spa, with each payment handled separately.

For hotels operating across multiple properties or countries, this becomes even more complicated. Different providers, payment methods and reporting systems make it harder to deliver a consistent guest experience and give finance teams a clear view of transactions. As hotel groups expand, managing these disconnected systems becomes increasingly difficult.

ExploreTECH / One foundation, three connected layers. Shiji identifies the architecture; Louise Hibbert makes the hidden work visible; Adyen connects the transaction. The business case needs to account for all three.

[9] Group PMS migration

Building connections that remove work

Shared information should reach the people and processes that depend on it.

SHIJI

An interoperable core

A connected hotel does not require every system to come from the same provider, but it does require a technology foundation designed around interoperability. Open APIs, cloud-native platforms, and consistent data standards are critical, but equally important is the ability to share guest, operational, and commercial data in real time across the business. The most successful hotel technology environments are built around a connected core where systems exchange information seamlessly rather than operating as standalone tools. At Hyatt Regency Chesapeake Bay, integrating PMS, POS, loyalty, and back-office systems across 11 F&B outlets created a single operational view supporting more than 221,000 covers and nearly US$8 million in net sales in the first half of 2026. [2]

DAUMANTAS GRIGARAVICIUS

Head of Middle East, Adyen

A common transactional layer

A unified payment infrastructure helps hotels connect payments across their properties and guest touchpoints, from online bookings to restaurants, spas and front desks.

Instead of managing separate systems, hotel groups can bring payment data together, making it easier to understand guest spending, simplify reporting and maintain consistent payment processes. They can also offer locally preferred payment methods across different markets.

Raffles Hotel Singapore is one example of how Adyen is helping reduce friction across these touchpoints, alongside other notable hotel brands it has partnered with. [7]

LOUISE HIBBERT

Business Development Director MEA
Access Hospitality

Fewer re-entries, earlier action

The first change is fewer re-entries. When a booking, a folio change and a payroll allocation share one record, staff stop copying details between screens and start working from a single version of the facts.

The second is timing. Problems such as a mismatched rate, a late cancellation or an unposted charge surface the same day instead of at month-end reconciliation.

The third is trust. Managers stop building parallel spreadsheets to check what the system says.

Connection does not remove the need for judgement, but it moves people's attention from finding information to acting on it.

> **“Hotels have rarely lacked technology. They have lacked connected technology.”**
>
> Louise Hibbert | Business Development Director MEA | Access Hospitality

AI Hospitality Survey / 1,000 hospitality businesses globally [10]

47%
hotels using 2-4 systems

25%
using 5+ systems

[2] Hyatt Regency Chesapeake Bay • [7] Raffles Hotel Singapore 2020 • [10] AI Hospitality Survey

How discovery is changing

Discovery is fragmented. Commercial control depends on connecting the hotel's presence with the path to booking.

JAN TISSERA / AMADEUS

President of International, Hospitality, Amadeus

A changing distribution ecosystem

The traditional distribution model was built for a predictable funnel. Today, travelers move across more channels and touchpoints than ever before. AI-driven conversations are playing an increasingly important role in travel inspiration, booking, and service, and hotels must remain visible, in control, and able to convert demand – all without adding operational complexity. Distribution is now a connected ecosystem spanning direct, OTA, GDS, social and conversational AI. Competing channel by channel is no longer enough. Success depends on orchestrating presence, pricing and merchandising coherently across every surface where a traveler forms intent, with the hotel firmly in control of the commercial relationship.

APOLLOS GAUSE

Senior Manager, Content & SEO, Cendyn

Visibility must lead to direct demand

The hardest challenge is turning increasingly fragmented traveler discovery into profitable direct bookings. Travelers are increasingly researching hotels across search, social, OTAs and AI-driven interfaces, while hotel content, rates, availability and guest data often remain spread across systems that were never designed to work together.

Hotels therefore need more than visibility. They need accurate, structured information to reach travelers wherever discovery happens, alongside a clear path from inspiration to direct booking. As channels continue to evolve, the competitive advantage will come from connecting these signals rather than optimizing each channel in isolation.

EXPLORETECH / MAKING HOTEL INFORMATION USABLE

GEO extends the fundamentals of SEO

Technical foundations

Structured data and schema, crawlability, site architecture, internal links, machine-readable content and AI crawler access.

Content and intent

Titles, metadata, keywords, anchor text, FAQs and seasonal content should answer conversational questions and traveller intent.

Authority and trust

Consistent schema and hotel information, quality content, third-party references, wider authority signals and backlinks.

GEO/search commentary: Apollos Gause, Senior Manager, Content & SEO, Cendyn.

Cendyn's Wayfinder / AI-native infrastructure addresses visible, accurate and authoritative hotel information across AI discovery. Its Search Campaigns for Travel closed beta combines live rates and availability with first-party guest and booking data. A guest can discover through AI, research in search, compare OTAs and reviews, then book directly: one connected decision journey. [12,15,16]

[12] Hotel Visibility Report • [15] AI-native infrastructure • [16] Search Campaigns for Travel beta

Does visibility become commercial performance?

Progression, bookings and revenue need different measures; none should be mistaken for an isolated technology effect.

JAN TISSERA / AMADEUS

President of International, Hospitality, Amadeus

Demand intelligence in daily decisions

The greatest value comes when demand intelligence moves beyond reporting and starts shaping daily commercial decisions. It can help hotels identify the right source markets and segments, optimize channel mix and make marketing investment more targeted. Leading hoteliers describe how AI-driven targeting and connected data ecosystems can help improve forecasting accuracy, inform channel mix decisions, and support stronger commercial performance. The impact can be measured through metrics such as RevPAR, customer acquisition cost, and conversion. But the deeper value is strategic: moving investment toward the markets, segments and moments most likely to deliver profitable demand.

AMADEUS

44.7% / 25.9%

Booking-engine progression

AI-driven visitors / organic traffic, respectively. [4]

Early Performance Manager AI Search pilots; not completed bookings or booking conversion.

CENDYN

148-hotel search benchmark

+116% organic revenue / +66% organic bookings / +58% organic conversion. Average keyword visibility +2%; individual properties +10-60%. [12]

H2 versus H1 2025; GEO within wider SEO/marketing. Association, not isolated GEO causation.

AMADEUS

Demand360 / market context

44,000 hotels; 35 million short-term rentals; a 12-month forward view. [6]

Forward-looking market coverage, not measured commercial uplift.

CENDYN

Park Regis Business Bay, Dubai

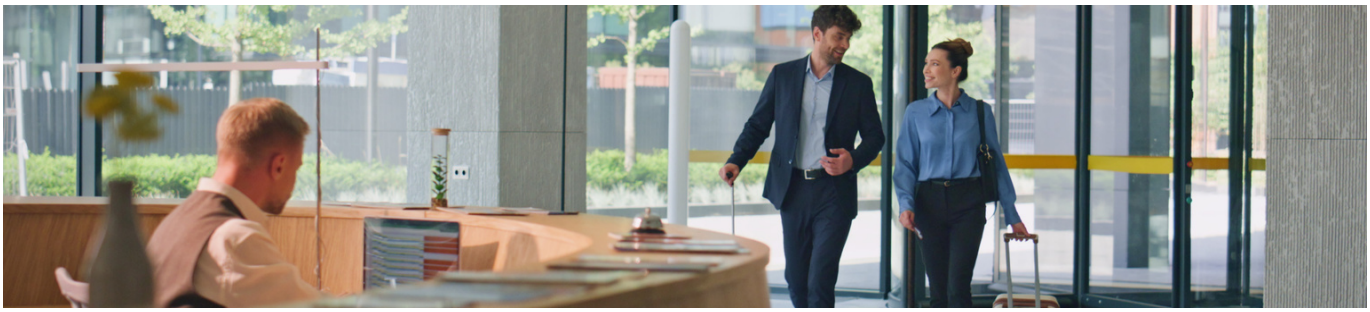
+23% organic sessions / +93% revenue / +92% organic bookings / +144% keyword visibility. Metadata, schema, redirects, link repairs and content changes. [12]

Dubai location and ADR may also have influenced revenue. Case period not supplied.

[4] AI Search pilot results • [6] Demand360 market view • [12] Hotel Visibility Report

Guest context meets the work behind the stay

A guest relationship depends on both a coherent profile and the people coordinating the experience.



DARREN CAPLE / ELEANOR

CEO & Co-Founder, Eleanor

The coordination guests do not see

The biggest disconnect is often hidden in plain sight. From pre-arrival to departure, guests experience one resort, but delivering that experience can involve disconnected systems, multiple departments and considerable manual coordination.

The guest sees their request fulfilled and management sees a satisfied guest. Neither necessarily sees the phone calls, WhatsApp messages, emails and follow-ups behind it. Frontline teams become so used to these workarounds that they're accepted as normal.

I think technology providers have let resorts down by developing fragmented solutions that create more workaround processes, rather than supporting the experience guests expect. It's our responsibility to reduce that complexity and give resort teams more time with guests.

NIELS MEKENKAMP

Senior Director, Solutions Engineering, Cendyn

A trusted guest view that keeps updating

First-party data gives hotels something increasingly valuable: context about their own guests, from browsing and booking behavior to preferences and spend. But having the data is not enough. Too often these signals remain fragmented across CRM, booking, marketing and on-property systems, preventing hotels from seeing the complete guest journey.

Hotels need to connect those signals into a trusted, continuously updated view that can inform decisions across acquisition and retention. The real opportunity is to use that intelligence across the journey, finding more high-value guests, making engagement more relevant and strengthening the direct relationship over time.

ADYEN

Belmond / connected guest payments

Belmond connected its payment and PMS infrastructure to support mobile check-in and wireless guest payments. [19]

[19] Belmond

Continuity across people, departments and transactions

Shared context should reduce guest friction while giving each team the information it needs to act.

DARREN CAPLE / ELEANOR

CEO & Co-Founder, Eleanor

Coordination in the background

If we started with a clean sheet of paper, we'd design one system connecting the guest journey with the teams delivering it. We wouldn't necessarily build separate solutions for every department and then try to connect them all afterwards.

Activities, dining, spa, guest requests and communication should be managed through one platform, giving teams the information they need without switching systems or relying on manual handovers and workarounds.

That means fewer systems, fewer integrations and less fragmented information. Technology should handle coordination and administration quietly in the background, leaving staff to focus on guests rather than managing software.

JAN TISSERA / AMADEUS

President of International, Hospitality, Amadeus

Data continuity and responsible use

The opportunity is not simply to add more technology, but to connect the information already generated throughout the guest journey. When guest, booking and operational data remain fragmented, hotels can struggle to maintain context as a traveler moves from discovery to booking, arrival, the stay and beyond.

Greater interoperability and responsible data use can help create a more consistent view across these touchpoints. This gives hotel teams better context to make interactions more relevant and timely, while reducing friction for the traveler. Ultimately, a more connected data environment can help hotels move toward experiences that feel more seamless and personalized, while maintaining appropriate privacy and data governance.

ADYEN

90%

Phone-based checkout take-up

Raffles Hotel Singapore is one example of how Adyen is helping reduce friction across these touchpoints, alongside other notable hotel brands it has partnered with. [7]

CENDYN

Naumi Hotels / discovery to booking

Website modernisation and booking-path simplification: +55% direct booking revenue / +53% total bookings / +35% website users. [18]

The owned digital experience connects discovery with booking. Measurement period not supplied.

ExploreTECH / One connected journey. Eleanor connects service teams; Amadeus keeps context consistent; Adyen connects transactions; Cendyn links the owned digital journey with booking. Each supports a different handoff in the relationship.

[7] Raffles Hotel Singapore 2020 • [18] Supporting case summaries

Connecting service with the next relationship

Staff efficiency and lifecycle engagement become more useful when they share reliable guest information.

SHIJI

Less friction for staff and guests

The greatest impact of connected systems comes from removing friction across both guest-facing and operational processes. When employees no longer need to switch between multiple platforms, re-enter information, or manually compile data, they can focus more on service delivery and decision-making. For managers, connected data provides greater visibility across departments and enables faster, more confident actions. For guests, it creates more personalized and consistent experiences throughout their journey. At TIME Hotels, an integrated technology environment reduced administrative workload by 30% while improving guest satisfaction by 15%, demonstrating the direct relationship between operational efficiency and guest experience. [1]

NIELS MEKENKAMP

Senior Director, Solutions Engineering, Cendyn

Acquisition, conversion and retention together

The strongest impact comes when acquisition, conversion and retention stop operating as separate activities. Connected data helps hotels understand who their most valuable guests are, reach similar audiences, personalize engagement based on real context and identify commercial opportunities earlier.

Instead of generic acquisition and broad retention campaigns, hotels can use guest-level context and booking behavior to create more relevant, targeted engagement across the journey.

This will improve how teams optimize for meaningful outcomes: direct revenue, conversion, repeat business, cost of acquisition and marketing return, rather than evaluating channels and campaigns in isolation.

SHIJI

30% / 15%

TIME Hotels

An integrated technology environment reduced administrative workload by 30% and improved guest satisfaction by 15%. [1]

Vendor-reported customer results; measurement definitions and period should be read with the case.

CENDYN

€3.2M

15-property CRM group

Attributed campaign revenue; 3,583 bookings and 8,800 new loyalty sign-ups. Unified PMS/reservation data, segmentation and automated lifecycle/loyalty campaigns. [13]

2025 revenue and sign-ups. Attribution does not establish incremental profit.

ExploreTECH / The common mechanism. A unified guest view supports timely service and more relevant engagement. Measures of workload, satisfaction, bookings and revenue describe distinct parts of that relationship.

[1] TIME Hotels • [13] 15-property CRM group

Improving operational and financial performance

The performance case starts with work crossing systems, then connects that work to service, bookings and cost.

LOUISE HIBBERT

Business Development Director MEA
Access Hospitality

Measure the work that crosses systems

The clearest gains tend to sit in high-volume, repeatable work that crosses two or more systems.

Reservation and registration data captured before arrival removes keying at the front desk. Reconciling payments, OTA commission statements and city ledger entries shifts from manual matching to exceptions-only review. Housekeeping and maintenance status that flows straight to the PMS cuts the radio and phone checks that eat supervisor time.

Measure hours per occupied room and cost per booking, before and after. Profit follows when those hours are redeployed to revenue-generating work rather than absorbed by overtime.

DARREN CAPLE / ELEANOR

CEO & Co-Founder, Eleanor

Connecting resort operations with activity bookings

Eleanor's Maldives resort customer data shows average increases of 45% in bookings for ancillary revenue-generating activities at resorts under 100 keys and 60% at resorts over 100 keys. These figures measure activity bookings, rather than revenue. [17]

It's simple: connect the dots. Bring the guest journey and resort operations together, reduce the systems involved and eliminate fragmented information and processes.

I'd love to say there's rocket science behind these improvements, but it's much simpler than that.

ACCESS HOSPITALITY

286 hours/year

Time lost between systems

Per business, survey-reported. Associated cost finding: 13% of operational expenditure. 1,000 hospitality businesses globally. [10]

AI Hospitality Survey, commissioned by Access Hospitality. Survey estimates do not measure property-specific implementation savings.

ELEANOR

+45% / +60%

Activity booking increases

+45% at resorts under 100 keys; +60% at resorts over 100 keys. Bookings for revenue-generating activities, not revenue. [17]

Source: Eleanor customer data, Maldives resort portfolio. Some resorts doubled activity bookings; sample sizes and periods not supplied.

[10] AI Hospitality Survey • [17] Maldives resort customer data

Release time. Use it to improve performance.

Removing manual work creates capacity; productive redeployment and financial control determine its value.

OLIVER RABE

Chief Commercial Officer, Fairmas

Use time released for analysis

The real impact of connected data is the time it frees for analysis and decisions. With one source of truth, teams spend less time assembling figures and more time understanding which operational choices improve profit. Higher occupancy, for example, may generate more revenue without the expected financial return. That time saved makes monthly rather than quarterly forecasting more practical, allowing teams to test scenarios and act sooner. Comparable property data supports better decisions about performance gaps, cash requirements and where investment can deliver the greatest value.

DAUMANTAS GRIGARAVICIUS

Head of Middle East, Adyen

Payment performance across the group

Connected payments can deliver value beyond processing transactions. For guests, they can mean faster checkouts, fewer payment failures and a more consistent experience across hotel services.

For hotel operators, they can improve payment acceptance, simplify reconciliation and reduce the time finance teams spend manually matching transactions. Having a clearer view of payments across properties can also help identify fraud patterns and improve risk management.

The real opportunity is to measure these improvements across the entire hotel group, rather than looking at each property separately.

50% less registration / profile time

5 minutes saved per arriving guest from an approximately 10-minute process.

45% less guest request completion time

Source: Eleanor customer data, Maldives resort portfolio. [17]

> **“The real impact of connected data is the time it frees for analysis and decisions.”**
>
> Oliver Rabe | Chief Commercial Officer, Fairmas

ADYEN

Night-audit reconciliation

About 40 minutes to 10-20 minutes: 50-75% less time on night-audit reconciliation. [8]

Specific process measure, not a reduction in finance costs.

> **“Measure hours per occupied room and cost per booking, before and after.”**
>
> Louise Hibbert | Business Development Director MEA | Access Hospitality

[8] Financial reconciliation and night audit • [17] Maldives resort customer data

Protect margin through purchasing discipline

Revenue intelligence needs a counterpart on controllable costs: independent context for procurement decisions.

BENCHMARKET BENCHMARKET

Research Partner perspective

A controllable-cost opportunity

Hospitality has invested heavily in tools to win demand, optimise room rates and improve the guest journey. Yet one of its largest controllable costs, food procurement, is often managed with surprisingly little independent oversight.

Operators can track revenue per available room to the decimal, but struggle to answer a basic question: are we paying a competitive price for frying oil/rice/chicken fillet?

In a low-margin industry, even small purchasing inefficiencies accumulate across thousands of transactions. The opportunity isn't simply to cut costs. It's to bring the same management discipline to purchasing that already exists on the revenue side.

BENCHMARKET BENCHMARKET

What was paid is only half the picture

The problem isn't necessarily a lack of data inside hotels. It's a lack of market context outside them.

Operators have invoices, purchase orders, inventory systems and supplier contracts, but those tell you what you paid, not whether the price was competitive.

Foodservice pricing is fragmented, privately negotiated and difficult to compare across brands, specifications and pack sizes. Better data can connect actual purchasing activity to like-for-like market benchmarks.

That turns a cost increase from something to accept or dispute on instinct, into something you can diagnose, challenge and act on, without undermining valuable supplier relationships.

> **“The real impact of connected data is the time it frees for analysis and decisions.”**
>
> Oliver Rabe | Chief Commercial Officer, Fairmas

LOUISE HIBBERT access Hospitality

Business Development Director MEA
Access Hospitality

Make hidden work measurable

The same discipline applies to administrative work: measure hours per occupied room and cost per booking before and after systems connect. Identify which handoffs disappear and whether the released time becomes productive capacity.

[20] Submitted procurement perspective and illustrative F&B economics • [10] AI Hospitality Survey

Turning data into decisions

Shared information becomes useful when it changes a forecast, recommendation or action in time to matter.

EXPLORETECH / A SHARED DECISION FRAMEWORK

Reporting	Prediction	Recommendation	Action
Reliable facts	Demand and scenarios	Options and priorities	Execution and learning

OLIVER RABE

Chief Commercial Officer, Fairmas

From annual plans to rolling forecasts

A hotel room night cannot be stored for sale later: once the night has passed, the opportunity to earn that revenue is gone. As events, conferences or travel restrictions reshape demand, financial plans need to reflect those changes. Connected systems reduce time spent collecting and reconciling data, allowing teams to reforecast more frequently and maintain a rolling view of revenue, costs and cash flow. The annual budget remains a reference point, while updated forecasts help teams challenge assumptions and respond to changing conditions early enough to influence results.

“The annual budget remains a reference point, while updated forecasts help teams challenge assumptions and respond to changing conditions early enough to influence results.”

Oliver Rabe | Chief Commercial Officer, Fairmas

JAN TISSERA / AMADEUS

President of International, Hospitality, Amadeus

Forward-looking market intelligence

Historical performance remains important, but it can no longer provide the full picture. In a fragmented landscape, hotels increasingly need forward-looking demand, market and traveler insights to understand not only what happened, but what is likely to happen next. Data gaps remain a major barrier, especially around forward-looking, competitor, and actionable guest insights, and closing them is now a commercial priority. Bringing these signals together can give commercial teams a more connected view of demand and help inform pricing, marketing and distribution decisions. The opportunity is to move from looking at data in isolation to using intelligence across the business to identify where demand is coming from and how best to capture it.

Benchmarket adds external context: purchasing records show what was paid; like-for-like market benchmarks help assess whether it was competitive. [20]

AMADEUS

AI investment intentions

499 of 500 hoteliers surveyed planned AI investment; average planned spend was US$319,000 per hotel. [5]

Survey plans are not actual spending or realised return.

[5] Travel Dreams 2026 p 31 • [6] Demand360 market view

From systems of record to systems of action

Operational action and commercial intelligence rely on the same connected, consistent information.

LOUISE HIBBERT

Business Development Director MEA
Access Hospitality

Trust the data, then act on it

Managers stop building parallel spreadsheets to check what the system says. Connection does not remove the need for judgement, but it moves people's attention from finding information to acting on it.

AI HOSPITALITY SURVEY [10]

32%

of hoteliers are confident in the data from their current systems.

76%

of operators say real-time consolidated data from multiple systems would support faster decisions during busy trading periods.

1,000 businesses

AI Hospitality Survey, commissioned by Access Hospitality; hospitality businesses globally. Hotel sub-sample and fieldwork dates not supplied.

RICK POSEY

VP, AI and Product, Cendyn

What action should happen next?

Yes. The shift will be from using AI mainly to create content or analyze past performance toward using it to help determine what action should happen next.

With connected data, AI can identify changing demand, recognize valuable guest behaviors and recommend the appropriate audience, offer, channel or interaction.

The longer-term direction is therefore less about running isolated campaigns and more about continuous commercial decision-making across the guest journey.

Importantly, AI should support rather than replace hospitality: technology can make decisions more predictive and individualized, while people continue to shape strategy, brand and the human relationships that define the guest experience.

SHIJI

30,000+

Globales Hotels / 47 hotels

30,000+ additional guest insights; +142% survey responses; +14.2% NPS. Connected feedback creates a richer base for future decisions. [3]

2025 versus 2024. NPS change is relative, not points. Results do not isolate AI ROI.

[3] Globales Hotels • [10] AI Hospitality Survey

Measuring the return

Return needs a baseline, a consistent measure and a clear link between operational change and owner outcomes.

OLIVER RABE

Chief Commercial Officer, Fairmas

Beyond room revenue

A hotel can improve RevPAR without improving the owner's return. That is the limitation of viewing performance primarily through occupancy, ADR and RevPAR: they show room performance, but leave costs, profitability and capital requirements unanswered. Owners need a broader lens, combining TRevPAR with gross operating profit per available room (GOPPAR) to compare profitability across hotels of different sizes. Hotels are also real estate assets essentially, so operating profit per available square metre helps assess how productively the building is used. These measures need consistent definitions and calculation standards to be comparable across properties, giving owners a sound basis for performance assessment and capital allocation.

LOUISE HIBBERT

Business Development Director MEA
Access Hospitality

Build the before-and-after comparison

Measure hours per occupied room and cost per booking before and after a connection is introduced. Track re-entry, matching and checks removed, then establish whether staff hours move into revenue-generating work or reduce overtime. The 286 hours/year survey finding identifies potential friction; it does not establish savings at a particular hotel. The financial case depends on its own baseline and the productive use of released capacity.

FAIRMAS

12 hotels

Tidan / Canada

Tidan Hospitality and Real Estate Group's 12 hotels relied on manual budgeting and consolidation; forecasting was rare. FairPlanner made forecasting regular and introduced a rolling 12-month bank schedule, reducing manual-entry errors and improving loan-decision information. [11]

Vendor-reported process and financing-information improvements; no quantified saving or isolated ROI supplied.

Define the result before the investment

Labour intensity

Hours per occupied room; scope the team and period.

Acquisition effort

Cost per booking, including process and channel costs.

Time redeployed

Separate capacity released from cash cost removed.

Financial outcome

Connect measured change to profit and cash flow.

[10] AI Hospitality Survey • [11] Tidan Canada customer case

Compare outcomes without confusing the measures

Supporting cases show where value can appear. They do not make growth, attributed revenue and profit interchangeable.

DAUMANTAS GRIGARAVICIUS

Head of Middle East, Adyen

Measure payment value across the group

Acceptance, payment failures, reconciliation effort and fraud or risk visibility belong in the same group-wide performance view. A faster night audit is a specific process result; its owner value depends on cost, staff time and the wider payment experience.

SHIJI

Hyatt Regency Chesapeake Bay

11 connected F&B outlets; 221,000+ covers and nearly US$8m H1 2026 net sales. Comparable results: +9.7% sales / +10.5% per cover / +20.8% per check. [2]

Equivalent January 21-June 30 periods, 2025 and 2026. Operating trends, not isolated technology causation. [Reporting-period wording awaiting Shiji confirmation.]

CENDYN

Makarem / targeted metasearch

+208% direct bookings / +141% generated revenue / +122% return on ad spend (ROAS), using first-party audiences and dynamic bidding. [14]

2024 versus 2023; growth and marketing return, not net profit.

ELEANOR

From activity bookings to financial return

The +45% / +60% Maldives averages measure activity bookings. Assess financial return using prices, delivery costs and capacity. Registration and request time are separate operational outcomes. [17]

Customer portfolio results; the financial link requires property-level measures.

EXPLORETECH / MEASURE THE WHOLE BUSINESS CASE

Use comparable definitions and periods, include implementation and ongoing costs, and distinguish observed growth, survey opportunity, campaign attribution and net financial return.

[2] Hyatt Regency Chesapeake Bay • [14] Makarem metasearch results • [17] Maldives resort customer data

Translate purchasing decisions into financial outcomes

Procurement return connects decisions with realised savings, avoided cost, management time and F&B operating margin.

BENCHMARKET

Research Partner perspective

Measure decisions, then outcomes

Benchmarking only creates value when it influences decisions on the ground.

A useful system identifies which products are materially above comparable market prices, weights them by actual spend and checks whether negotiated prices are being honoured across properties.

Procurement can then prioritise the few interventions with the greatest commercial impact, rather than chasing every variance.

The improvement should not track the volume of alerts generated.

Better impacts to measure are: realised purchasing savings; cost increases avoided; management time saved; incremental F&B operating margin.

BENCHMARKET

Illustrative F&B economics

AED 20m annual F&B revenue
30% food purchasing = AED 6m
5% purchasing-cost reduction
AED 300,000 annual savings
+1.5 percentage points F&B operating margin [20]

Illustration, not a customer result. Assumes unchanged revenue and other costs, with purchasing savings flowing through to operating profit.

Benchmarket states that a 5% reduction is achievable and reports client food-cost reductions of up to 10%. This is a vendor-reported claim, not a universal result; customer scope and measurement periods were not supplied. [20]

FAIRMAS

Financial discipline beyond purchasing

At Tidan's 12 Canadian hotels, regular forecasts and a rolling 12-month bank schedule improved the information available for planning and financing decisions. No quantified saving was supplied. [11]

ADYEN

Connect time to financial value

The 40-minute to 10-20-minute night audit measures process time. Establish the hours and costs actually removed or redeployed before translating that change into financial return. [8]

Editorial approach: ExploreTECH connects eight Research Partners across six stages. Customer cases, survey estimates, investment intentions and illustrative economics retain distinct scope. Expert commentary uses confirmed named speakers; otherwise it is company-attributed. Evidence sources identify companies or research, not the contacts who supplied them.

[20] Submitted procurement perspective and illustrative F&B economics • [11] Tidan Canada customer case • [8] Financial reconciliation and night audit

2027 / Shared priorities

Different specialisms point toward connected information, useful action and stronger guest relationships.

ADYEN

Daumantas Grigaravicius
Head of Middle East, Adyen

Payments as guest insight

As payment technology becomes more connected, hotels will have greater opportunities to recognise returning guests, simplify check-ins and offer more personalised experiences across properties. Payment data can also help hotel groups better understand spending patterns, improve loyalty programmes and make more informed business decisions.

AMADEUS

Jan Tissera
President of International, Hospitality, Amadeus

AI becomes a planning entry point

AI assistants are expected to become a mainstream travel-planning entry point alongside, and sometimes ahead of, search and OTAs. AI-generated summaries change visibility. Teams should invest in Generative Engine Optimisation, prepare distribution infrastructure for conversational and agentic discovery and booking, and build data foundations for real-time personalisation. People-led, AI-powered teams can keep control of the commercial relationship as the planning interface changes.

CENDYN

Rick Posey
VP, AI and Product, Cendyn

Continuous commercial decisions

AI can move from creating content and analysing past performance to recommending the next audience, offer, channel or interaction. Connected guest context and changing demand make engagement more predictive and individualised. Continuous decisions should support a coherent guest journey, while people shape strategy, brand and the human relationships that define hospitality.

2027 / People and judgement

The next phase of technology should support better service, financial judgement and interoperable information.

ELEANOR

Darren Caple
CEO & Co-Founder, Eleanor

People deliver hospitality

There's enormous pressure on resorts to embrace AI. But beyond the promises, many are still asking: Where do we start? What will it deliver? How do we measure success? The opportunity is practical. AI can work quietly in the background, connecting information, anticipating guest needs and removing administration that keeps staff away from guests. But AI is only as useful as the data behind it. If information is scattered across disconnected systems, its value is limited. People deliver hospitality, not technology. AI should give resort teams better information and more time to look after guests, not replace the people who make the experience personal.

FAIRMAS

Oliver Rabe
Chief Commercial Officer, Fairmas

Reliable data, human judgement

The value of AI in hotel forecasting will depend on the quality and consistency of the financial data beneath it. More data alone will not create better decisions; inconsistent definitions and unreliable inputs can simply produce misleading conclusions faster. Looking toward 2027, sound data foundations will become increasingly important as AI supports more frequent forecasting and scenario analysis. Finance and asset managers will need to translate those insights into action, questioning assumptions and assessing trade-offs. Their judgement will remain essential to balance short-term profitability with investment needs and the long-term value of the asset.

BENCHMARKET

Research Partner perspective

Procurement becomes a performance discipline

During 2027 I expect market pressure and increasing availability of AI tools to start shifting procurement from a reactive cost-control function to a more strategic performance discipline. Automation should take on more of the quantitative work: tracking price changes; checking contract compliance; identifying alternatives; and flagging supply risk before it becomes an operational problem. That gives procurement professionals more time for work that demands judgment, such as collaborating with chefs, improving specifications and strengthening supply resilience. Importantly, the strategic objective isn't necessarily the lowest price. It is the right price for the required specification, quality and supplier reliability.

2027 / Work that gets simpler

Connected systems should remove work. The outlook brings operational action and interoperable information together.

SHIJI

Interoperability over consolidation

AI is unlikely to replace hotel systems, but it will fundamentally change how their data is used. As AI becomes embedded into hospitality operations, the quality, accessibility, and connectivity of data will become even more important than the individual applications themselves. We expect AI to accelerate interoperability rather than consolidation, enabling hotels to extract value from specialized systems while connecting insights across commercial, operational, financial, and guest experience functions. Hotels with connected data ecosystems will be best positioned to benefit. For example, expanding guest feedback collection across 47 hotels generated more than 30,000 additional guest insights, creating a richer foundation for data-driven decision-making and future AI applications.

ACCESS HOSPITALITY

Louise Hibbert
Business Development Director MEA
Access Hospitality

From record to action

Specialist tools will keep multiplying, because no single system does everything well. For 2027, Access Hospitality sees the most important shift as moving from systems of record, which show what happened, toward systems of action, which act on behalf of hotel teams. That depends on a unified data structure across hotel systems, sharing the same guest, room and labor information. Operators should judge specialist tools by the work they remove, whether they contribute to the shared data structure, and whether they simplify rather than add complexity for employees. Simplicity should come from the underlying connected layer, allowing staff to work in fewer places while maintaining guest service.

RESEARCH AND CASE SOURCES / LINKS WHERE AVAILABLE

Access Hospitality - [10] AI Hospitality Survey

Adyen - [7] Raffles Hotel Singapore 2020 / [8] Financial reconciliation and night audit / [19] Belmond

Amadeus - [4] AI Search pilot results / [5] Travel Dreams 2026 p 31 / [6] Demand360 market view

Benchmarket - [20] Submitted procurement perspective and illustrative F&B economics

Cendyn - [12] Hotel Visibility Report / [13] 15-property CRM group / [14] Makarem metasearch results / [15] AI-native infrastructure / [16] Search Campaigns for Travel beta / [18] Supporting case summaries

Eleanor - [17] Maldives resort customer data

Fairmas - [11] Tidan Canada customer case

Shiji - [1] TIME Hotels / [2] Hyatt Regency Chesapeake Bay / [3] Globales Hotels / [9] Group PMS migration