

Beyond the Stay

Rethinking Value in Hospitality

Room revenue is no longer the end game



Our survey of 600 hotel leaders across 16 markets reveals that relevance—before, during and after the stay—is the new driver of value.

What does relevance demand today?

Keeping pace with travelers’ expectations. Delivering consistent returns to owners. And growing in a market that’s more volatile than ever.

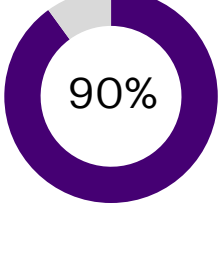
The leaders doing this well are building value differently, harnessing four building blocks shaping the future of hospitality.

Four building blocks of value creation in hospitality

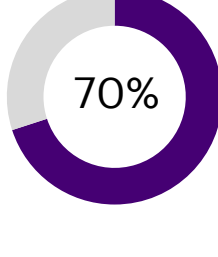
01

Redefining revenue, beyond the room and stay

Layer new revenue streams to capture more value across the guest journey.



Of hotel leaders say they are pivoting to new business models or plan to do so in the near future.



Of those expect revenue growth from these models within the next 12 months. Meanwhile, 28% expect it sooner—within the next six months.

Top 4 investment bets
Ranked by over 60% of leaders

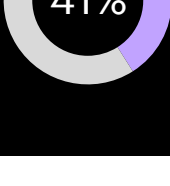
Retail, e-commerce and shopping	Monetizing underutilized spaces	Partnership with travel and non-travel brands	Resort and all-inclusive model expansion

02

Amplifying loyalty as a growth driver

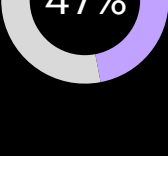
Use loyalty to fuel direct bookings, engagement and new revenue streams.

Leaders still see loyalty as retention



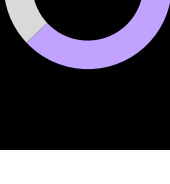
Hotel leaders view loyalty as a retention tool and not a revenue engine. Only 37% view it as a key driver of direct bookings.

Members say loyalty is losing value



Loyalty members feel the programs do not provide as much value as they used to.

Especially in China



of executives in China view loyalty primarily as a retention tool, with India and Japan close behind.

Yet they contribute more than non-members

1.8x

more likely to engage with the brand.

2.0x

more likely to accept a higher price point.

3.7x

more likely to recommend the brand online.

03

Brand strength and reputation are winning deals

Focus on incentives and ROI-driven strategies to build lasting partnerships.

How branded hotels choose a partner



Brand strength and reputation (23%)

Most important factor



Financial terms and fee structure (9%)

Least important factor

Europe and LATAM defy global trend

Europe

Branded hotels prioritize global distribution and loyalty reach (18%) over brand reputation (16%)

Argentina

Financial terms and fee structure, and access to global distribution and loyalty programs (33%)

Brazil

Tech and innovation support (27%)

What owners want more of

1. Participation in group purchasing with preferred suppliers (54%)
2. Fee structure, flexibility and transparency (50%)
3. Performance benchmarks and accountability (47%)

What owners get less of

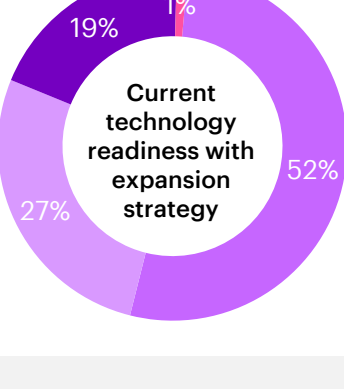
1. Limited financial incentives or ROI-driven strategies (53%)
2. Insufficient technology integration and digital tools (48%)
3. Lack of strategic alignment on long-term business goals (47%)

04

Addressing the technology alignment paradox

To drive growth, build connected platforms that align data, strategy and execution.

The ambition level today



Just 1% say their tech is outdated; 52% say it’s moderately aligned with their strategy, 27% say it’s fully aligned.

- Outdated and misaligned
- Needs major upgrades
- Moderately aligned
- Fully aligned

The paradox

The hospitality industry is not seen as a leader in tech innovation, yet most executives are satisfied with their current technology enablement.

7 in 10 hotel leaders

face challenges in tech modernization

Top modernization roadblocks

1. Workforce and change management (22%)
2. Cost and ROI concerns (19%)
3. Data, security and compliance (15%)

Adoption inconsistencies (15%)

Foundational systems need urgent attention

Only 2 in 10 executives prioritize cybersecurity and cloud-based property management systems, posing potential risks to scalability and data resilience

Tech transformation priorities in the next three years

1. System integration and interoperability (21%)
2. Strategic alignment and leadership (19%)
3. Workforce readiness and change management (18%)

A new era of hospitality is here

One that demands reinvention in how value is created, how relationships are built and how the business runs for guests, owners, operators and partners.

Those who move first will shape what comes next.

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