

# The New Search Economy: Rewriting the Rules of Direct Booking with AI



Written by h2c  
and Aven Hospitality

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# Message from Aven Hospitality

Mark Hollyhead is Chief Transformation Officer for Aven Hospitality. A champion for bold change and innovation, with a commitment to elevating customer experience, he is a dynamic executive with over 30 years of leadership experience driving strategic transformation, operational scale, and customer-centric innovation.

We are standing at a defining moment for hospitality.

Traveler behavior is shifting at an unprecedented speed.

Across every corner of the industry, AI is reshaping how people search, choose, and experience travel.

In “The New Search Economy: Rewriting the Rules of Direct Booking with AI”, Aven Hospitality reaffirms our commitment to pioneering this future.

We’ve introduced new turning point questions into this research to sharpen our understanding of how AI-powered solutions are transforming hotel operations, retailing, and guest engagement. These insights don’t just reflect where the industry is headed – they spotlight where innovation must accelerate.

Our vision is bold – and deeply rooted in possibility. We are the company shaping hospitality’s future, bringing intelligence and innovation to every part of the business. Our cloud-native platform, SynXis, not only gives hotels the tools to unlock new revenue streams – but also transforms predictive data into action, building personalized guest experiences in a world where demand is ever-evolving.

For years, distribution channels have become fragmented but now hotels have a golden opportunity to articulate their value and determine how that source of truth flows across every channel. With conversational search becoming the norm, the highest bidder is no longer the winner – but the best answer.

Aven empowers hoteliers to be that answer.

Distribution is about being present everywhere your guest might look – in every query, every conversation, every moment of intent. Early adopters who take control of their distribution strategy today will set the pace for tomorrow, staying visible in the channels that matter most as AI reshapes the landscape.

This whitepaper offers a clear call to action: engage deeply with the insights, challenge old assumptions, and collaborate with Aven as we shape a smarter, more connected future for hospitality. The leaders of the next decade will be the ones who act now.

Finally, I want to extend my sincere thanks to h2c our research partner, and Langham Hospitality Group who made this whitepaper possible. Your perspectives fuel our innovation and strengthen our shared vision for what hospitality can become.



# The Current State of Search

Today's global hotel industry spans nearly 16 million rooms across more than 140,000 branded hotel properties worldwide, yet much of that scale is constrained by fragmented distribution, legacy systems, static search and pricing models. While the supply side has grown, the way hotels are discovered, priced, and sold has not kept pace.

Travelers, meanwhile, are changing fast. They are moving beyond traditional search and booking paths, turning instead to AI-powered assistants for itinerary planning to shape their travel decisions. Discovery has become non-linear, and intent is no longer expressed through simple keywords.

As travelers redefine how they plan and book, hotels must ensure they remain visible and relevant within this new competitive landscape. With unprecedented volumes of data at their disposal, hotels now have a rare opportunity to take control of how their products, services, and experiences are recommended and sold.

The next generation of guest engagement will be defined not by where travelers book, but by how effectively hotels use technology to understand and respond to guest intent in real time.

## Guest Intent is the New Game

The era of sifting through countless listings or navigating a flood of generic advertisements is behind us.

Although traditional search engines continue to manage a large volume of queries, generative AI is swiftly becoming the go-to source for inspiration, research, and tailored recommendations by transforming information into clear, contextual responses.

**Customer**

I'm looking for a relaxing weekend by the sea, with a spa and good wine

**Hotel AI**

Based on your preferences for a seaside location, spa facilities, and quality wine offerings, here are several recommended options:

- Sea-view Stay** \$4,000
- Sun & Sea Spa Treatment** \$2,500
- Curated Wine Flight Experience** \$3,000

Today, a traveler might turn to an AI chatbot as a stand-in for a personal travel agent, simply signaling: “I’m looking for a relaxing weekend by the sea, with a spa and good wine.” In response, tailored recommendations can surface instantly—directly from the hotel—combining a sea-view room, spa treatments, and a curated vineyard experience, complete with pricing and immediate booking options.

The traveler’s digital journey is shifting away from keyword-based searches and lengthy booking forms toward a more seamless, conversational experience — reflecting how travelers naturally think, ask, and decide.

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## Key Changes to Search Behavior



### Conversational Search

Queries like *"What's the best family-friendly hotel near the Dubai Mall with a spa and free breakfast?"*



### Answer Engine Dominance

Users expect summaries via AI Overviews and Google's Search Generative Experience, reducing link clicks



### AI Assistants to Agents

Chatbots offer 24/7 support; agentic AI will handle multi-step tasks like price monitoring and bookings



### Hyper-Personalization

AI leverages past behavior and real-time context for tailored recommendations, like pet-friendly rooms

## The First Stop for Travel Decisions

Consumers are rapidly defaulting to AI-powered search, from conversational tools like ChatGPT and Gemini to Google's AI Search Overview, to guide decisions, evaluate brands, and increasingly discover new ones.

From h2c's AI & Automation in Hospitality research in 2025, 44% of AI-powered search users say AI is their primary source of insight—outpacing traditional search engines (31%), brand or retailer websites (9%), and review platforms (6%).

The reason is simple: AI feels more personalized, more context-aware, and far more efficient than manually comparing dozens of tabs.

Early audits of AI-generated hotel recommendations show these journeys are synthesized from multiple travel sources, including hotel brand websites and OTAs being the dominant input.

The takeaway is clear: AI-powered search is no longer emerging—it is already mainstream in trip planning and booking decisions.

## Shaping Every Stage of the Guest Journey

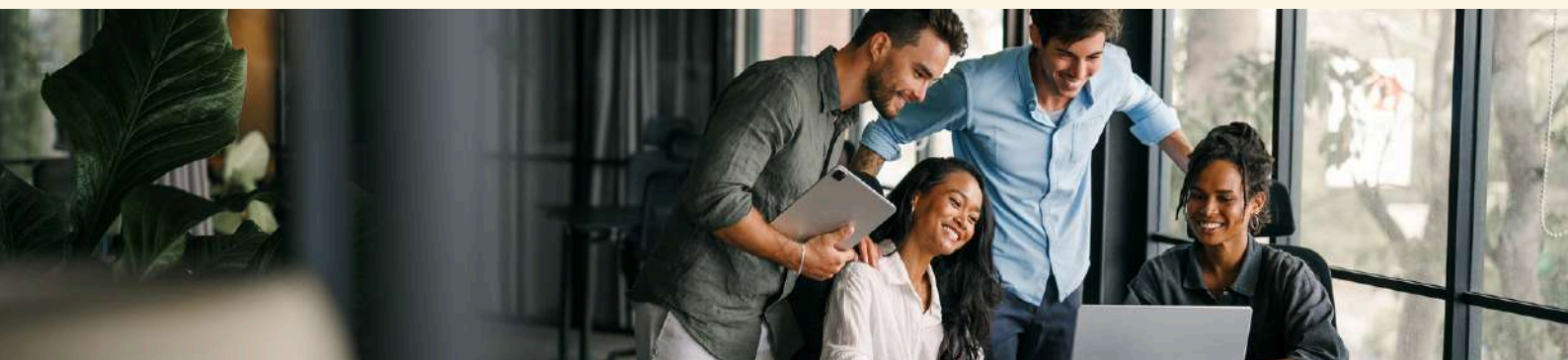
AI has become a critical channel for shaping intent and driving conversions. According to [McKinsey](#), 73% of consumers use AI-powered search for awareness tasks, such as exploring categories, brands, or services, while 53% rely on it during the planning phase to shape trips or special occasions. At the decision stage, 61% consult AI to understand product features, and 60% use it to summarize reviews (*McKinsey, New front door to the internet: Winning in the age of AI search, Exhibit 1*).

Those that fail to manage how AI interprets their offerings risk being overlooked, while hotels that proactively control their data and content can influence awareness, engagement, and bookings. Access to accurate ARI (availability, rates, inventory), guest profiles, loyalty logic, and ancillary offerings across connected systems

allows AI to deliver results that are not only relevant but ready to transact.

Hotels that unify and activate their data A move from reactive reporting to real-time decision intelligence, where recommendations and booking options dynamically adapt to each traveler's context. During the consideration phase, AI's influence is just as strong: 57% of consumers turn to AI for personalized recommendations, and 60% use it to compare products and services.

Success will no longer be defined by placement alone, but by how well a hotel's value and unique experiences are presented at the moment of intent. Over the next few years, AI search is expected to evolve into fully transactional booking experiences, powered by intelligent AI agents.



# The Emerging AI Stack for Direct Booking

While chatbots have seen widespread adoption (used by roughly 4 in 10 chains), and are expected to become a standard capability, the next evolution lies in smart AI agents. These agents go beyond simple responses to taking over execution—completing bookings, orchestrating payments and loyalty, and tailoring offers across the hotel's core systems.

This transition marks the move from AI as an answer engine to AI as an action engine, redefining how hotels attract, convert, and retain guests.

While AI-enhanced tools already guide discovery and personalization, most hotel systems remain siloed, limiting automation and live connectivity. The journey toward agent driven distribution is underway—but bridging intent, data, and action will define who leads the next chapter of hospitality innovation.

The winners in this new search economy will be those who can interpret natural language, behavioral cues, and context to anticipate what a traveler truly desires—and surface the most relevant, bookable options with precision.





# AI Adoption: Where Hotel Chains Stand Today

The prevalent use of AI has shifted hospitality businesses to move beyond experimentation into execution, with almost 80% of hotel chains reporting that they already use AI in some shape or form. h2c's research focuses on chains, which tend to lead in AI adoption—about 80% compared to just 41% of independent hotels—highlighting the gap in maturity across the industry.



**80%** of hotel chains  
already use AI vs  
**41%** of independent hotels

SOURCE: h2c, 2025

From chatbots and automated marketing to predictive analytics, hotel chains are embedding AI across operations and guest touchpoints.

As the range of possibilities continues to expand, AI is rapidly shifting from a novel concept to a powerful lever for competitive advantage.

# Key AI Priorities

For hotel chains, the most transformative AI applications today center on three areas: chatbots and virtual assistants, the end-to-end guest journey, and hyper-personalized experiences.

Chatbots and virtual assistants have already seen broad adoption, with 42% of hotel chains worldwide deploying these tools to handle routine inquiries and provide instant support.



# 42% ↗

of hotel chains already use AI chatbots and virtual assistants

h2c, 2025

Yet, despite this progress, many hotels still underutilize AI across the broader guest journey. True personalization remains limited, often constrained by gaps in AI strategy, insufficient staff expertise, and fragmented technology ecosystems—where disconnected systems and siloed data hinder the ability to deliver seamless, tailored experiences.

The potential for growth is significant.

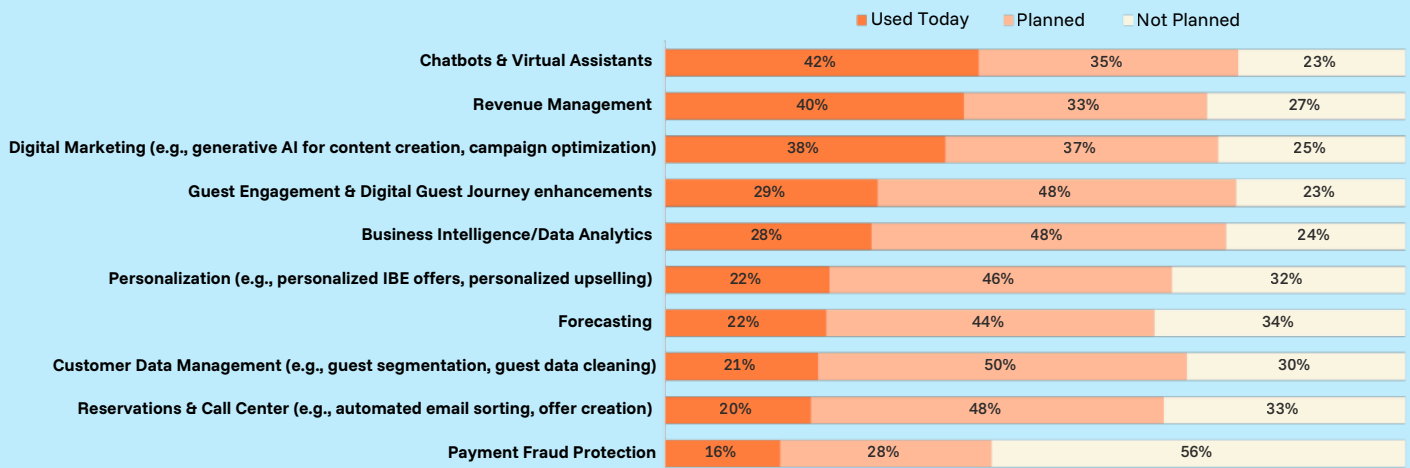
Hotels that invest in integrated AI solutions, unify their data, and extend AI beyond first-touch interactions can drive meaningful improvements in engagement and conversion.

The strong pipeline of planned initiatives across chains reflects this opportunity: AI is no longer a novelty, but a strategic lever to orchestrate every step of the guest journey and deliver personalized experiences at scale.

# The State of AI Adoption

## High Rate of Planned AI Implementations

Top business areas where hotel chains are currently using AI or **planning to use AI** within the next 12-24 months



In which business areas is your company currently using AI or planning to use AI within the next 12-24 months?

N = 188. Note: 147 are currently using one or more AI applications, while 168 are planning to implement at least one new AI application.

## AI's Growing Role in Hotels

Adoption varies widely by region and chain size, with larger organizations and certain markets advancing faster.

AI assistants—reactive tools for customer and staff interactions such as chatbots and virtual assistants—are now the most widely deployed, with 34% of hotel organizations already using them and another 37% planning adoption.

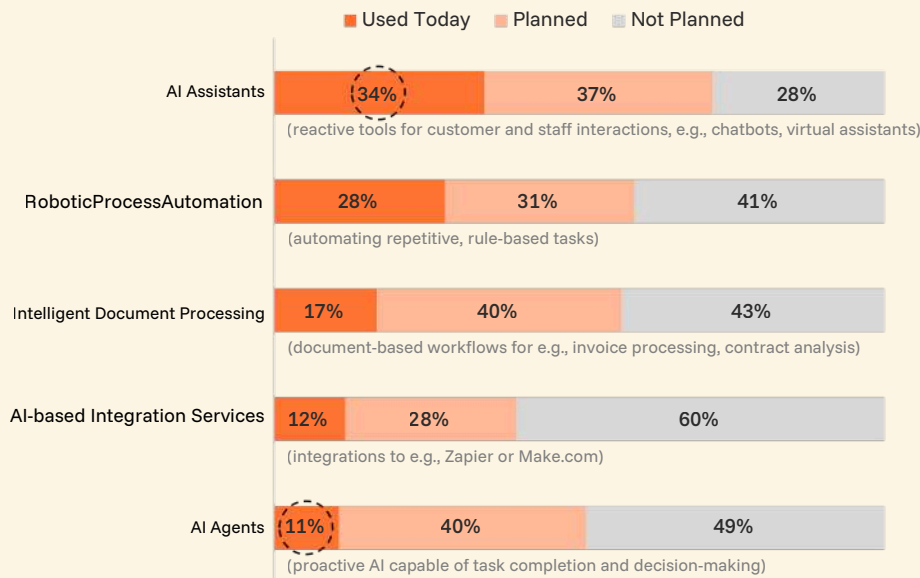
At the cutting edge, AI agents—capable of independent decision-making and autonomous action—are currently implemented by just 11% of organizations, though 40% plan to explore their potential.

In other words, roughly one in three hotels has integrated AI assistants, while only one in ten has moved toward true AI agents.

Looking ahead, AI agent adoption is expected to rise sharply over the next one to two years, particularly for automating guest inquiries and operational tasks, as the technology continues to mature and deliver tangible business impact.

# Adoption of AI Solution Types

## Current Use and Future Plans



**1 in 3**

organizations use AI Assistants, while only

**1 in 10**

use AI Agents

### AI Assistants vs. AI Agents

**Assistants** help with specific tasks and respond to user input.

**Agents** act independently, making decisions and taking steps toward a goal.

**In short:** Assistants react; agents act.

What types of AI solutions are you currently using or planning to use in your organization? (Select one per row, only select Other if applicable). N = 175. Other: N = 5.



# Biggest AI Challenges

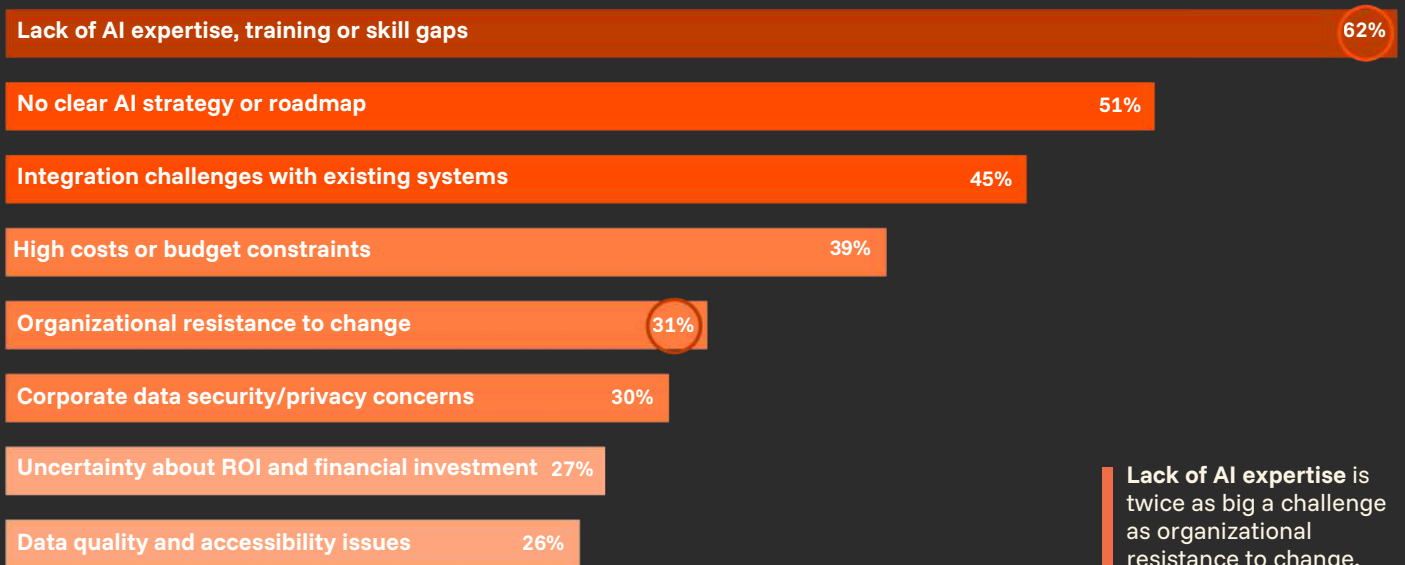
Senior executives from hotel chains highlighted a range of strategic challenges in adopting AI. The most pressing is a lack of in-house AI expertise, an issue that remains significant even among large chains.

Over half of organizations still operate without a company-wide AI strategy, as coordinating initiatives across departments can be complex. System integration also presents a major hurdle, with multiple disconnected platforms limiting AI's ability to deliver seamless insights. Finally, budget constraints continue to slow adoption and experimentation.

Notably, the lack of AI expertise is considered twice as significant as organizational resistance to change. To bridge this gap, many hotel groups are finding value in vendor-provided, AI-integrated solutions, which reduce the need for large internal specialist teams.

At the same time, some chains, depending on scale and strategic ambitions, continue to invest in building internal AI capabilities, ensuring they can innovate and maintain control over their technology roadmap.

## Biggest Challenges of Adopting AI & Automation



What are the biggest challenges or barriers your organization faces when adopting AI and automation? (Select all that apply). N = 172



# In Conversation: How AI Is Redefining Strategy, Data, and the Guest Experience in Hospitality

## h2c interview with Amy Read, VP of AI & Innovation

**Q: What impact will AI have on hospitality jobs and the guest experience?**

A: Connections are at the heart of hospitality. By leveraging AI to automate routine tasks, staff will have more time to focus on meaningful interactions with guests, ultimately adding value and enhancing the guest experience. Guest expectations have evolved; today's travelers expect immediate responses and seamless access to information, preferring instant answers rather than spending time searching hotel websites. AI-driven solutions not only meet these new expectations but help build even stronger connections between hotels and guests.

**Q: Which AI-powered feature(s) do you think will have the biggest impact on direct bookings?**

A: Agentic AI, tightly integrated with generative AI technologies, will have the greatest influence on direct bookings. Guests increasingly expect to interact with their preferred AI interfaces instead of browsing individual hotel websites and will want to complete bookings using these conversational platforms. Another critical area is revenue management. AI will deliver a new level of personalization by optimizing rates, inventory, and offers in real time, while simultaneously analyzing competitor data. This will drive

smarter pricing strategies and ensure that inventory is continuously optimized across all distribution channels, resulting in increased direct bookings and higher overall revenue.

**Q: Which challenges are hotel chains facing with data management for AI projects?**

A: Data silos are a persistent challenge in hospitality today, with hotels relying on multiple disconnected systems and platforms. The lack of unified and structured data prevents seamless integration and makes it difficult for AI to read and utilize information for personalization. To fully enable AI-driven personalization, hotels and their tech systems must ensure their APIs are "AI readable" and capable of supporting unified data streams. Only then can data be leveraged effectively to create personalized guest experiences and unlock the full potential of automation.

**Q: Where do you see innovation happening next?**

A: Over the next couple of years, I think innovation in hospitality will become much more guest-driven and far more intelligent. We're already seeing the early signs, but the real shift will come as AI agents evolve beyond simple chatbots. These agents will act more like digital travel companions—able to interact directly with hotel systems, make informed recommendations, and even complete transactions on a guest's behalf.

At the same time, there's a growing movement toward decentralized identity. Guests will increasingly own and control their personal data, deciding when and how it's shared. That creates the foundation for genuinely personalized experiences, without compromising trust or privacy.

Ultimately, all of this comes together in the idea of a seamless, AI-powered travel companion. Planning, booking, payments, itinerary management, and on-trip recommendations will be unified through a single, guest-owned agent that works across devices. Instead of today's fragmented journey, travelers will experience continuity and personalization at every touchpoint—and hotels will be able to engage guests in a far more meaningful way.

**Q: What will success look like for AI in hospitality?**

A: AI will become part of daily life much sooner than expected. Once the industry solves centralized guest profiles, hyper-personalization will follow—hotels will predict what guests want and automate recommendations. Guests will use their preferred AI interface for everything, spending less time searching and comparing online.



# High-Growth AI Opportunities in the Booking Engine

AI is transforming the hotel booking engine from a transactional tool into a dynamic platform for engagement, personalization, and revenue growth. Personalized offers and upselling are emerging as the highest-impact opportunities: 59% of hotel chains plan to implement AI-driven personalization, while 60% plan targeted upselling initiatives—making these areas the next wave of investment in intelligent booking experiences.

**59% of hotel chains plan to adopt AI-driven personalization**

**+59%**

**60% plan to implement AI-powered targeted upselling**

**+60%**

By tailoring offers to individual guest preferences and suggesting relevant upgrades or add-ons, hotels can increase average booking value while strengthening direct relationships with guests.

Real-time chatbots rank third in planned adoption at 43%, demonstrating clear value in guiding travelers through complex booking decisions and driving direct bookings. Voice-activated booking interfaces, while currently at 26% adoption, are expected to gain momentum as voice technology becomes more sophisticated and integrated into everyday devices.

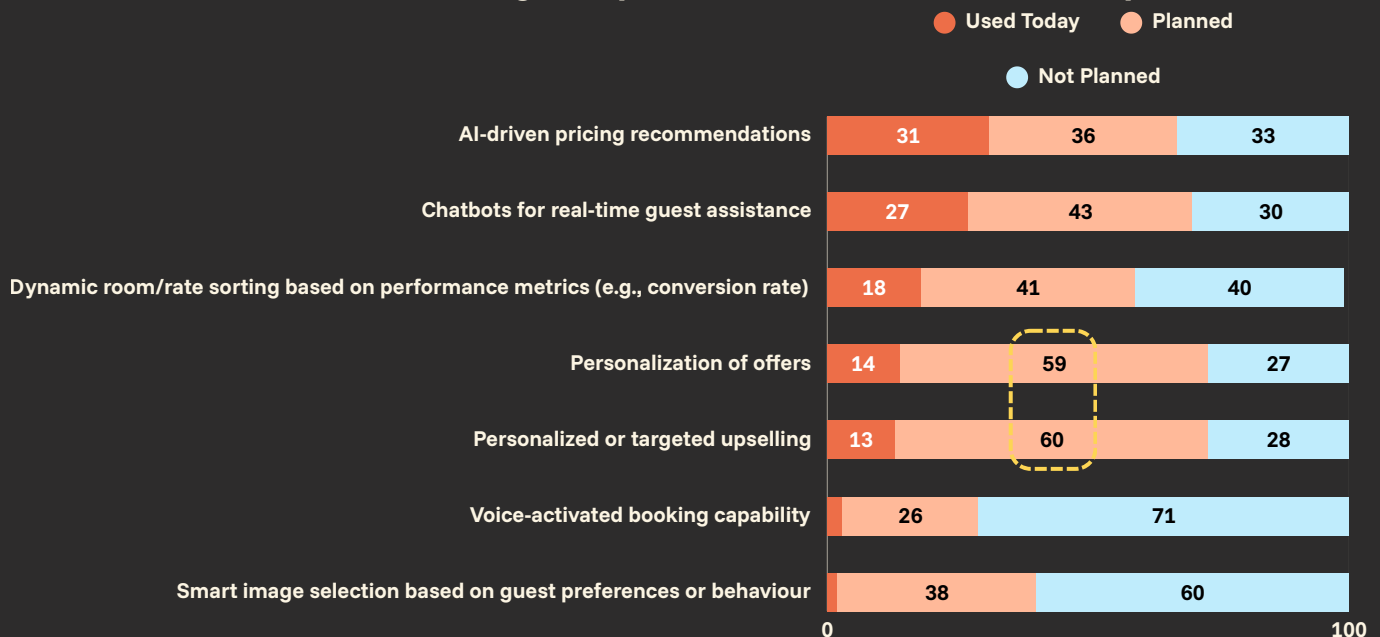
Collectively, these AI enhancements signal a strategic shift: the booking engine is no longer just a point of sale, but a hub for personalized engagement to optimize revenue.

Hotels that act early to implement these capabilities are best positioned to capture higher-value bookings, reduce reliance on intermediaries, and meet travelers' rising expectations for seamless, intelligent booking experiences.



# Adoption Level of AI-powered Features

**Personalization** has the highest potential for near-term IBE implementation



Which AI-powered features are you currently using or planning to implement in your organization's booking engine? (Select one per row, only select Other if applicable). N = 154

Other: Respondents did not provide additional comments

AI-driven targeted and personalized marketing campaigns stand out as the single most influential solution for driving direct bookings, according to survey respondents. When asked to identify the one factor with the greatest impact, hoteliers consistently highlight the ability to deliver relevant, timely, and tailored messaging to travelers as a primary lever for conversion.

At the same time, other AI applications—including dynamic pricing, conversational assistants, and automated channel optimization—collectively account for nearly two-thirds of responses, reflecting a recognition that the full value of AI extends across multiple touchpoints and operational processes.

For hotel leaders, the takeaway is clear: while personalized marketing may lead the pack, fully leveraging the ecosystem of AI capabilities—including pricing, distribution, and conversational technologies—is key to capturing the full potential of direct bookings and long-term guest loyalty.

# Most Impactful AI Solution for Increasing Direct Bookings

Marketing campaigns dominate, while pricing and automation remain vital

AI-driven targeted and personalized marketing campaigns

**37%**

Dynamic pricing algorithms to optimize room rates in real-time

**24%**

Chatbots and virtual assistants to handle direct bookings and guest enquiries

**21%**

Dynamic and automated channel optimization

**19%**

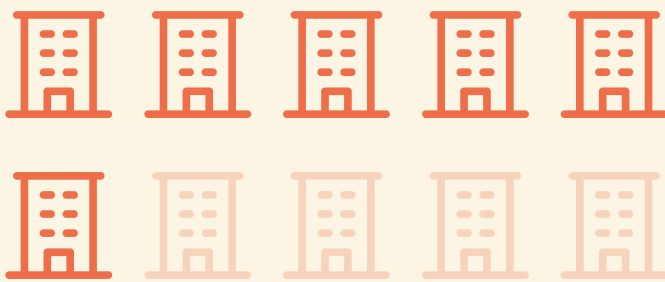
If you had to choose one, what innovative AI solution do you believe would be most impactful in increasing your direct bookings and reducing reliance on OTAs? (Select one). N = 144

Figures may not add up due to rounding.





# Key Investment Considerations in AI



**6 in 10**

**hotel chains prioritize seamless AI integration with their existing systems**

SOURCE: h2c, 2025

Seamless system integration is the top priority for hotel chains evaluating AI solutions, with 61% of respondents citing it as their leading factor. This underscores a critical insight: hotels view AI not as a standalone tool, but as a capability that must operate natively within their existing technology stack.

Integration has remained a top consideration for system investments

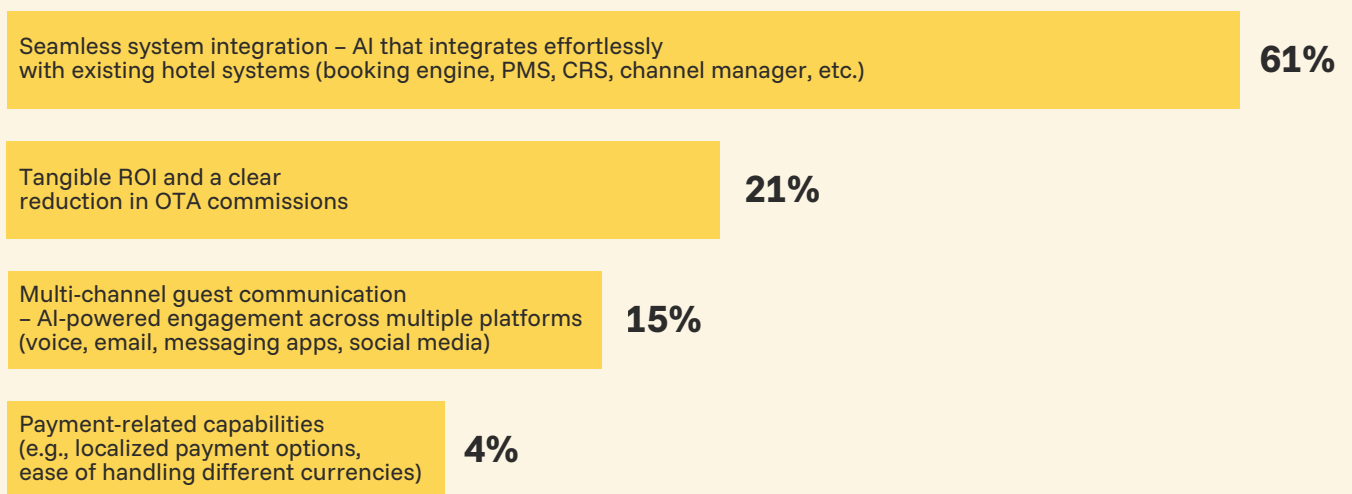
since h2c's 2017 study, reflecting ongoing frustration with fragmented, siloed environments. Rather than adopting isolated applications, hotel chains seek AI solutions that can leverage shared data, workflows, and user interfaces across the organization, enabling smoother operations and better decision-making.

Vendor-provided AI solutions are increasingly able to meet this requirement.

Embedded within core systems, they can access richer data, accelerate implementation, and reduce ongoing maintenance compared to bespoke, standalone tools. In this way, integration is not just a technical necessity—it's a key driver of ROI, ensuring that AI enhances operational efficiency, personalization, and revenue growth across the hotel enterprise.

## Top Investment Priority for AI Solutions in Hospitality

Seamless system integration is the leading decision factor – chosen by 61% of respondents, far ahead of ROI or guest communication features



Regarding the factors above, which single factor most influences your decision to invest in an AI solution for enhancing direct bookings and guest engagement? (Select one). N = 140  
Figures may not add up due to rounding.



# OTAs Supply the Data, Hotels Own the Experience

In today's AI-first landscape, travelers are increasingly starting their searches with conversational assistants like ChatGPT or Gemini, eroding OTAs' former advantage as the default "first click" discovery channel.

AI engines now act as answer layers, pulling options simultaneously from OTAs, metasearch platforms, review sites, social media, and direct hotel sources.

As these AI-driven results become fully bookable, OTAs are shifting from being the primary interface to just one of several inventory sources—provided hotels ensure their content and connectivity are robust enough for AI systems to access and transact on.

For hotels, this means that OTA visibility is increasingly determined by AI relevance and ranking signals, rather than placement alone. Pricing and commission structures remain important, but they are now complemented by the need to deliver structured, machine-readable content and real-time data through trusted hospitality platforms.

Leading AI companies like Google (Gemini) and OpenAI (ChatGPT) are actively seeking sources of structured, live data, forming partnerships and integrations with travel industry players such as Booking.com and Tripadvisor.

While OTAs remain a convenient option for many travelers, they cannot match the depth and richness of information hotels can provide directly. OTA data is inherently limited—it reflects only contracted inventory, allocated rooms, selected offers, and a narrow snapshot of non-ARI content, such as detailed descriptions, images of facilities, or comprehensive FAQs.

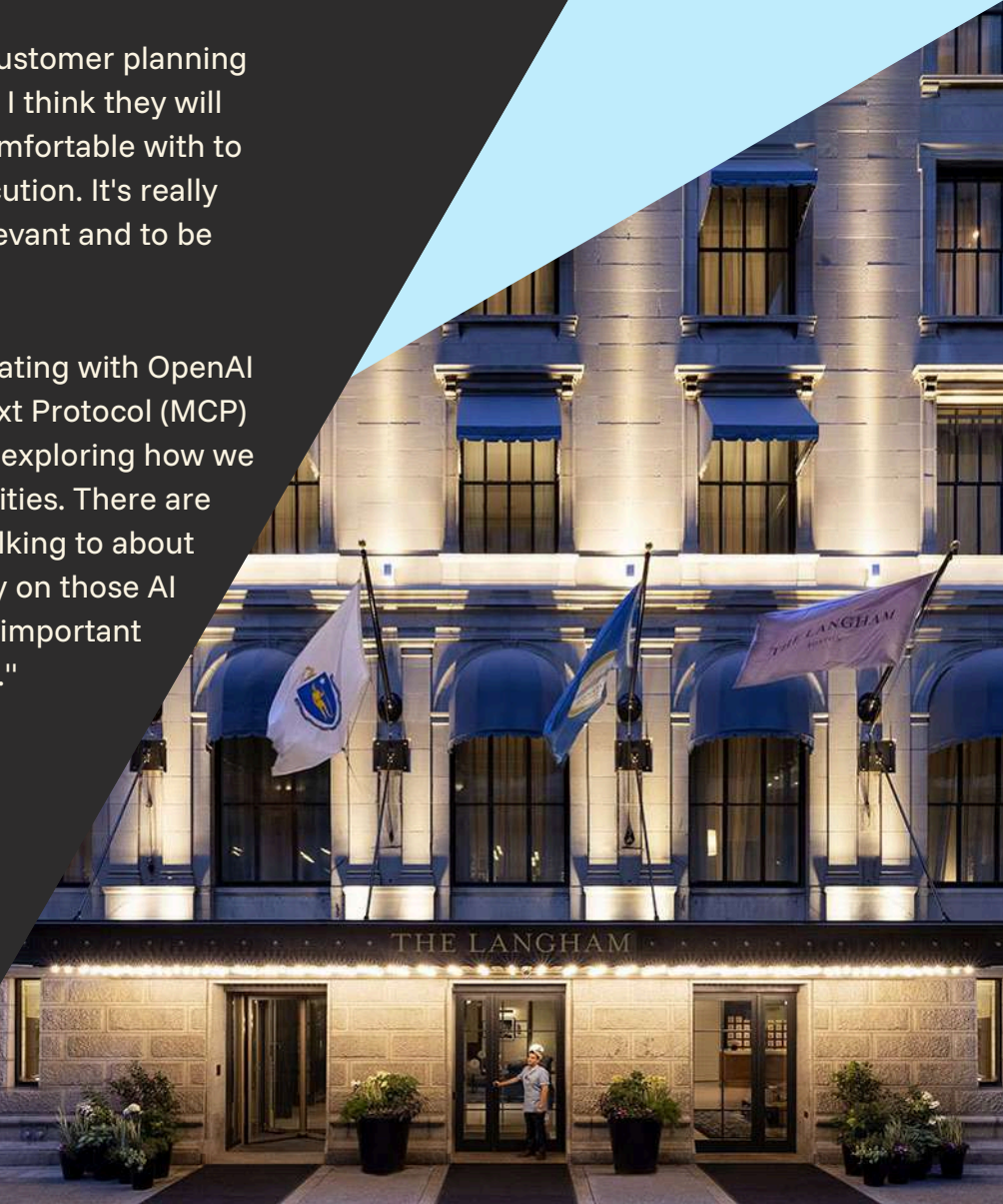
Simply put, OTAs can put hotels on the map, but rarely capture its full story or unique value. Every conversational query now becomes a potential opportunity to route demand toward hotel direct channels.

# How Langham Hospitality Group is Transforming Guest Experiences and Operations with AI

As artificial intelligence (AI) increasingly shapes how travelers discover and choose hotels, Langham Hospitality Group is taking a bold approach to stay ahead of the curve. Sean Seah, SVP of Strategy, Technology and Innovation at Langham Hospitality Group, emphasizes the importance of meeting guests where they are:

"AI will play a pivotal role in customer planning and pre-trip experiences, and I think they will go to whichever AI they're comfortable with to start planning the whole execution. It's really important for hotels to be relevant and to be there.

The OTAs have started integrating with OpenAI through several Model Context Protocol (MCP) layer integrations. We're also exploring how we can best leverage our capabilities. There are several players that we are talking to about how we can raise our visibility on those AI channels. So I think it's really important to compete in this new space."



Langham's AI strategy is currently structured around three core pillars spanning the customer journey, staff enablement, and operational intelligence. On the guest-facing side, the hotel has partnered with Aven Hospitality to implement Concierge for Booking, an advanced concierge tool - dubbed Sam AI - that communicates across 50 languages via voice, chat, and email. Seah highlights the tangible benefits:

**"It has been very successful in terms of revenue, room nights, and customer sentiment. It speaks 50 languages across multiple channels—voice, chat, and email. We've seen a marked increase in customer satisfaction, revenue, and operational cost savings because staff can focus on in-person interactions rather than repetitive queries."**

The second pillar is staff AI, which empowers teams to leverage AI in guest engagement, training, and operational decision-making. Staff are trained to apply AI tools while staying aligned with brand standards and operational procedures. The third pillar, insights AI, combines sales, marketing, and operations data to find opportunities, improve campaigns, and personalize guest experiences at scale. Together, these initiatives enable Langham to deliver smarter, more relevant guest experiences.


Seah describes the transition from experimentation to adoption as rapid. "About a year ago, I started thinking seriously about how we could leverage AI, and within six months, we had found partners to build experiments. The

journey was really fast. In our model, we work with partners first because they have AI expertise. In future phases, we might build our own iterations leveraging Langham data. AI is just so relevant, fast, and changing that it has become core to making us faster, smarter, and better as an organization."

The technology is also transforming collaboration across the hotel. "We rolled out a company-wide AI training program to help staff understand AI, how to use it, and even how to do prompt engineering," Seah explains. Teams are now able to automate tasks using Copilot, AI agents, and low-code platforms, freeing them from reliance on IT. For example, compiling multiple customer reviews across several hotels used to take a week but with AI, it now takes just a day.

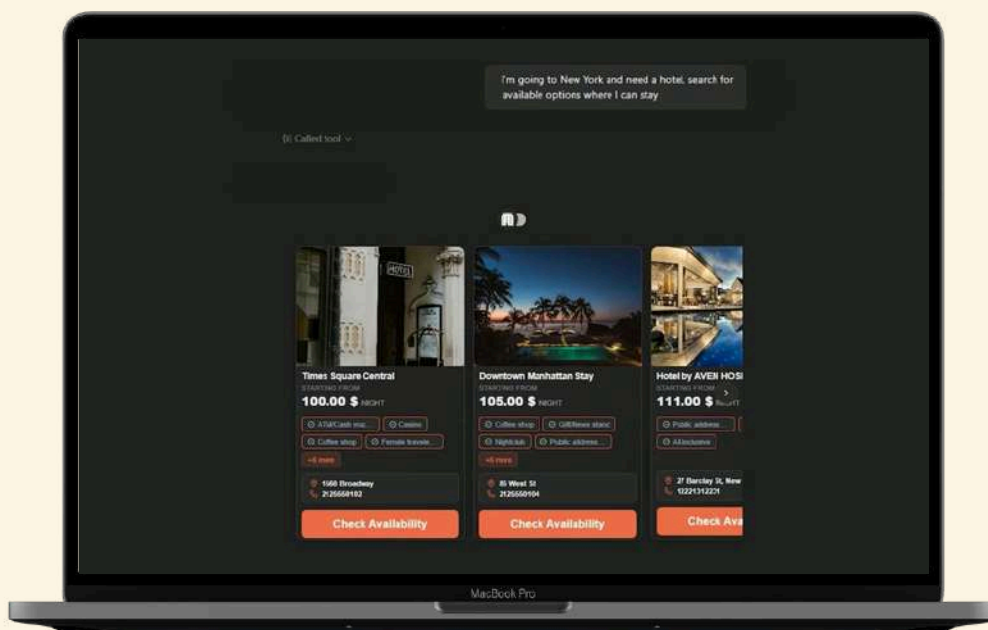
Langham's partnership with Aven Hospitality has been central to scaling these capabilities. "We were the first to roll out Concierge for Booking, which we call Sam. It was a very positive experience in pushing new boundaries," says Seah. "The hospitality industry is conservative with technology, and we're happy to partner and scale this ambition further to move from follower to industry leader."

Looking ahead, Seah sees AI as the next chapter in Langham's long history of innovation. "Langham has always been about luxury hospitality—AI is just another iteration of our innovation journey. We want to create amazing experiences and build legacies with our customers. The future of AI is about serving customers better, making staff smarter and more relevant, and redefining our business as we move forward."



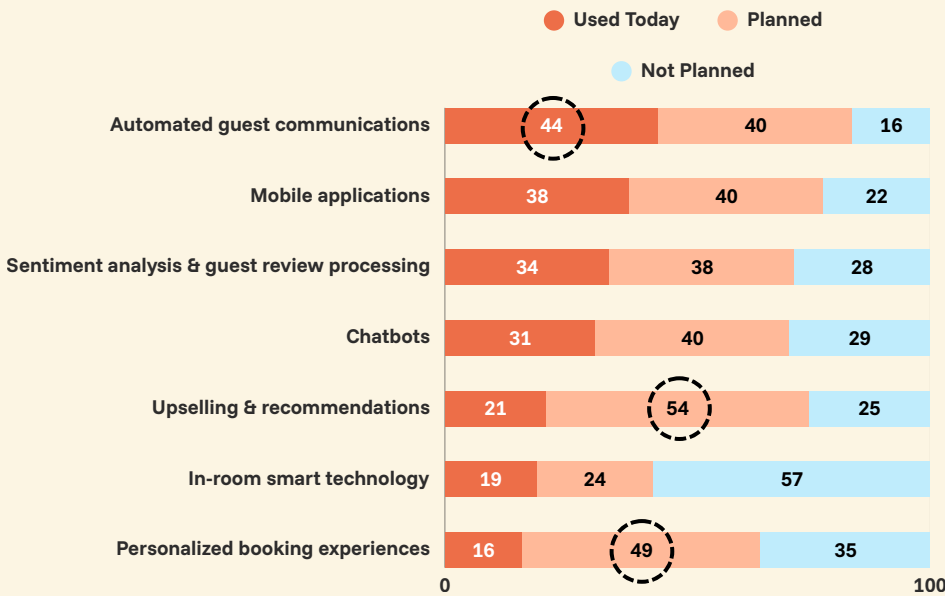
# Turning Engagement into Revenue Across the Guest Journey

AI is transforming how hotels drive direct bookings and revenue. Upselling recommendations—planned by 54% of hotel chains over the next 1–2 years—and personalized booking experiences (49% planned) are among the fastest-growing AI use cases in hospitality, with chatbots close behind as an emerging standard capability. Together, these tools create a seamless ecosystem that turns every interaction in the booking engine into a revenue opportunity.



With the help of AI, hotels can now turn guest inquiries to direct bookings and orchestrate upsell opportunities seamlessly during the reservation process. Contextual prompts and personalized offers convert these interactions into higher-value bookings, while predictive analytics delivers tailored upsell and cross-sell recommendations at key stages of the guest journey.

# Most important AI-driven applications



**Automated guest communications** is the only AI application with higher current use (44%) than planned adoption.

**Planning rates** for AI-driven guest experiences are high across the board – especially for:

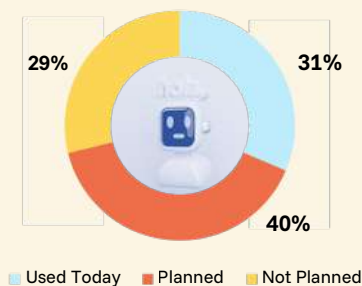
- **Upselling (54%)**
  - **Personalized booking (49%)**
- Both signal strong growth potential.

Which AI-driven technologies are you currently using to enhance the guest experience, and which do you plan to adopt within the next 12-24 months? (Select one per row, only select Other if applicable). N = 159

The impact extends well beyond pre-booking. During the stay and post-checkout, guests are highly receptive to timely, relevant interactions—room upgrades, spa appointments, late checkouts, or offers for future visits.

By leveraging AI throughout the full journey, hotels can strengthen direct relationships, maximize ancillary revenue, enhance loyalty, and reduce the manual workload for reservations and revenue teams.

## Current and Planned Use of Chatbots



With 40% of chains planning to implement chatbots, their **adoption rate is expected to surpass 70%**, making them commonplace soon.

## Chatbot Features Considered Essential

<b>Booking Process:</b> Handling guest inquiries and assisting with bookings	<b>85%</b>
<b>Multilingual Support:</b> Assisting international travelers in their native language	<b>82%</b>
<b>Direct Booking:</b> Enabling reservations directly through the chatbot	<b>71%</b>
<b>During Stay:</b> Automating common guest requests	<b>66%</b>
<b>Upselling:</b> Providing personalized upgrades and recommendations	<b>66%</b>

**Focus:** Booking, Language Support, and Guest Experience Automation

Which AI-driven technologies are you currently using to enhance the guest experience, and which do you plan to adopt within the next 12-24 months? (Select one per row). N = 159

Which features do you consider essential for a hotel chatbot? (Select all that apply). N = 146.



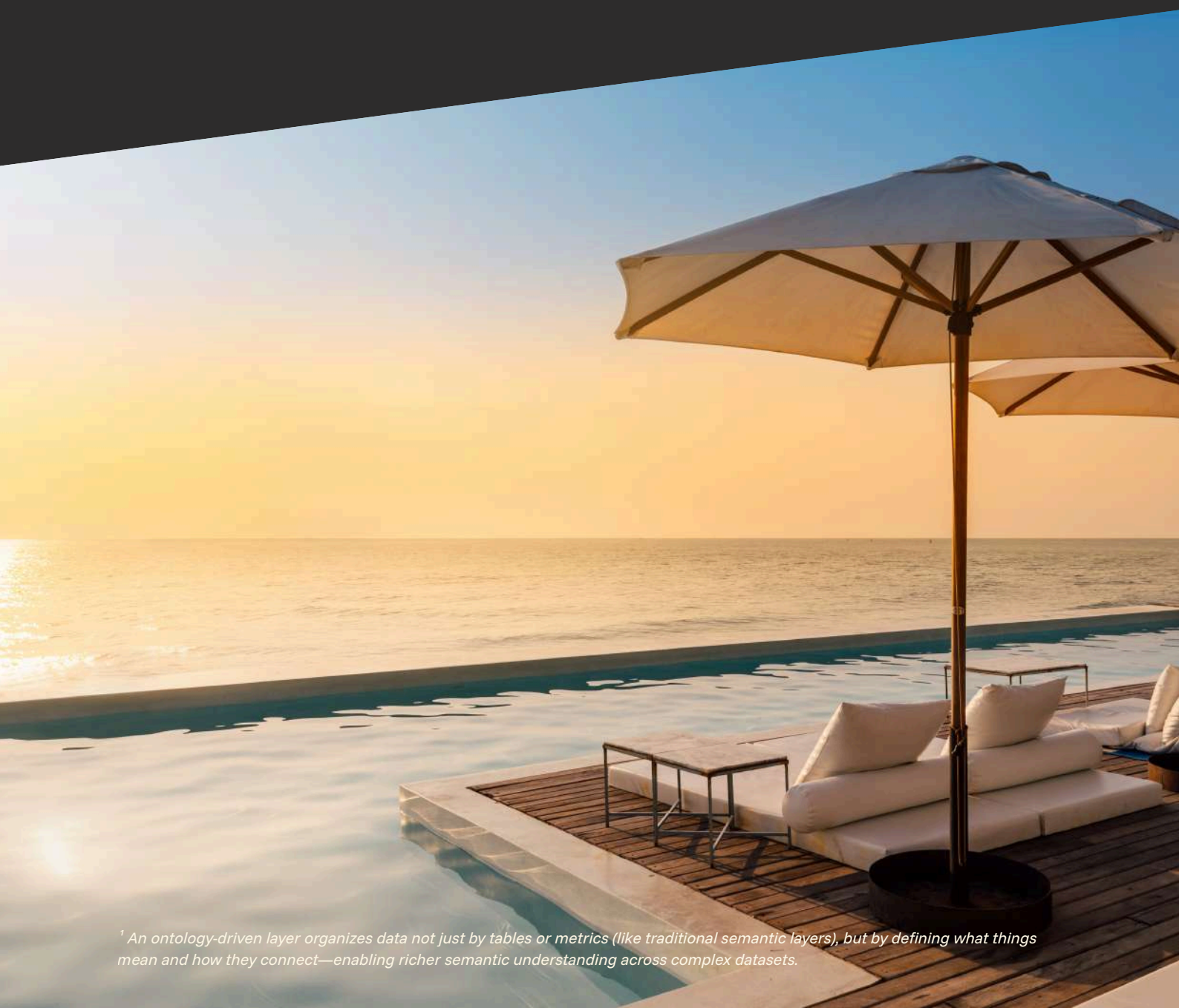
# Key Takeaways

- Hospitality distribution is evolving from static listings and channel management to AI-driven guest journeys, where search, merchandising, and booking are powered by real-time data and automation.
- Chatbots, AI assistants, generative AI, and agentic AI—combined with personalized booking experiences—are expected to become standard across booking engines and guest touchpoints within the next 1–2 years.
- The strongest near-term growth lies in AI-powered personalization and upselling within the booking engine, supported by continuous engagement before, during, and after the stay to drive higher-value direct revenue and loyalty.
- Platforms that unify availability, rates, inventory (ARI), loyalty, and content into a single actionable data layer are essential for powering search, pricing, and merchandising decisions effectively.

As travelers redefine how they plan and book trips, hotels must not only stay visible but lead in this rapidly evolving, hyper-competitive market. AI is emerging as the connective tissue of hospitality commerce - turning discovery, merchandising, and booking into intent-driven, data-rich journeys across channels and devices.

The hotels that will thrive are those that pair a clear AI strategy with seamless system integration across chatbots and the booking engine. By unifying rates, inventory, loyalty, and content into a single, ontology-driven layer<sup>1</sup> [RM1] and exposing it consistently to AI, every touchpoint becomes a direct-booking opportunity rather than a fragmented experiment.

Hotels that act today can capture higher-margin direct demand, deliver truly personalized guest experiences, and build an AI foundation that continues to pay dividends as new interfaces and traveler behaviors emerge—setting the pace for the next era of hospitality.



<sup>1</sup> An ontology-driven layer organizes data not just by tables or metrics (like traditional semantic layers), but by defining what things mean and how they connect—enabling richer semantic understanding across complex datasets.



# Ying'nFlo Case Study

## How Concierge for Booking is Transforming Guest Communications at Ying'nFlo by Langham Hospitality Group

At Ying'nFlo, guest experience has always been front and center. But as guest travel habits evolve and expectations grew, the team realized their communication approach needed a refresh. Recognizing this shift, Ying'nFlo partnered with Aven Hospitality to implement Concierge for Booking. The goal was to rethink how they connect with guests by making conversations faster, smarter, and more meaningful.

### Addressing key challenges

Ying'nFlo set out to improve the guest experience and operational efficiency by addressing key challenges in their communication workflows:

- **Language barriers** made it difficult to support international guests effectively across digital channels
- **Limited responsiveness outside of working hours** meant delays in addressing guest queries
- **Manual handling of repetitive questions** (e.g. price of rooms, restaurants) placed a strain on staff and reduced time for high-value guest interactions

## Meet Sam, Ying'nFlo's latest digital team member

Concierge was rolled out on Ying'nFlo's website, but instead of launching just another generic chatbot, the team gave it a name—Sam. That simple move made the assistant feel more approachable and part of the team.

Sam was trained to match Ying'nFlo's tone and answer common questions about amenities, bookings, and more. Thanks to its connection with Aven Hospitality's SynXis Central Reservations System, Sam could pull live data and give accurate answers to guests in real time. The setup process was easy too.

Sean Seah, SVP of Strategy, Technology and Innovation at Langham Hospitality Group shares: *"We've trained other AIs before, and they've been quite difficult... The platform you have is a very fool-proof way of setting up a conversational bot."*

## Tangible impact on daily operations

Since launching Concierge, the team has seen clear improvements across both guest experience and internal workflows:

- On average, Concierge saved over hundreds of manual work on the property per month, allowing staff to focus on more personalized and high-value interactions that enhance the guest experiences
- A significant share of booking-related conversations were successfully guided into the booking journey, with a portion resulting in confirmed bookings

*"Concierge has improved our team's efficiency by handling first-level queries. Previously, staff spent valuable time answering routine questions about dining options and the pool. Now that repetitive work is automated, allowing them to focus on higher-value tasks. More complex queries are seamlessly routed to live agents, ensuring personalized service where it matters most. It's a clear win in terms of productivity and cost savings."*



## Looking Ahead

For Ying'nFlo, AI isn't just about automation—it's about enhancing hospitality. The team sees tools like Concierge as key to helping staff do what they do best: create memorable guest experiences.

Looking ahead, they believe AI will transform into three key phases:

1. **Information:** Helping guests with answers and useful details
2. **Action:** Booking rooms, ordering services, and making reservations
3. **Anticipation:** Predicting guest needs before they're expressed

With Sam in place, Ying'nFlo is already building toward a future where every guest interaction feels easy, personal, and unforgettable.

*"I don't think it will be long before AI will recognize who you are and personalize the experience, helping hoteliers exceed all expectations of the experience you thought you were going to have."*



# Methodology

The following methodology refers to the proprietary h2c research that underpins the h2c charts and findings presented in this white paper.

Overall h2c study results are based on input from 171 unique hotel chains. In total, 189 responses form the basis of the quantitative research, comprising 177 online surveys and 12 executive interviews with hotel chains.

Regional coverage by number of responses: Europe (48%), Middle East & Africa (12%), Asia Pacific (16%), and the Americas (25%).

Additional market figures and examples cited in this white paper are based on thirdparty research (e.g., McKinsey, industry benchmarks) and are referenced separately.

## About h2c

Founded in 2001, h2c is a leading professional services provider to the global hospitality industry. The company specializes in empowering hotels and hospitality businesses to identify, implement, and manage the right technology solutions for their unique needs.

Backed by deep market expertise and regular market research projects that continuously track hospitality technology trends, h2c supports clients across every stage of digital transformation—from system specifications and RFP (Request for Proposal) processes to supplier-independent consulting and comprehensive project management.

h2c also offers Conttessa, a smart solution that automates static content updates across OTAs, metasearch sites, and direct channels—helping hoteliers save time, reduce errors, and ensure consistency.

**Mission Statement:** h2c inspires success in hospitality commerce. We turn marketplace complexities into actionable strategies, ensuring our clients remain confidently in control.

For more information, please visit [h2c.de](https://h2c.de)

## About Aven Hospitality

Aven Hospitality is a global SaaS technology leader, designed for what's next in hospitality. Built for the complexity of today and the possibilities of tomorrow, Aven is a future-forward innovator delivering next-generation solutions for hotel bookings and beyond.

SynXis, our leading hospitality commerce and distribution platform, transforms operational performance from planning to stays into seamless, memorable guest experiences — all within one connected ecosystem.

Leading with intelligence, our solutions anticipate what's next, turning predictive data into actionable strategies, unlocking new revenue streams, and creating lasting impact for hotels and their guests.

Today, Aven supports 35,000+ hoteliers with over 600 integrations and next-generation tools to drive growth at scale and elevate brands to world-class standards. We give hoteliers a strategic edge in a fast-moving market, enabling them to expand reach, maximize revenue, and delight guests everywhere — all while shaping the future of hospitality.

