

# *Trend Report*

TOURISM SECTOR

2026 - 2027

REPORT DE TENDENCIAS  
SECTOR TURISMO  
2026 - 2027

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## FOREWORD

# From anticipation to adaptation

## Update of the ILUNION Hotels trend report

In 2024, ILUNION Hotels prepared a strategic report identifying the 14 trends that, according to the analysis of experts and international sources, would mark the future of the tourism and hotel sector. This exercise made it possible to anticipate challenges and opportunities in areas such as sustainability, innovation, talent management, digitalisation and customer experience, laying the foundations for the company's decision-making and planning.

However, the tourism and hotel context is increasingly dynamic and volatile. Factors such as technological acceleration, the intensification of climate phenomena, the evolution of social expectations and the emergence of new risks have forced leading organizations to review and update their roadmaps on an ongoing basis.

For this reason, an update of that report has been carried out, with the aim of reflecting the real situation and prospects for 2026 and 2027 in a process that has allowed us to:

- **Review the evolution of the trends identified in 2024**, detecting which ones have been consolidated, which have changed priority and what new manifestations they present in the market.
- **Identify new emerging trends** that, due to their impact and transformative potential, must be incorporated into ILUNION Hotels' strategy in order to maintain its leadership and adaptability.

Many of the original trends have evolved in depth: sustainability has become an operational and reputational standard, digitalization has given way to hyper-personalization and artificial intelligence, and talent management has shifted towards hybrid and more inclusive models.

- The impact of climate change has become more tangible, forcing destinations and companies to adopt adaptation and resilience strategies, not just mitigation.
- Regulation and social demand have raised the bar in terms of accessibility, diversity, transparency and good governance.
- Innovation is no longer only technological, but also organizational, social and environmental.

## Key new trends for 2026

In this context of accelerated change, the analysis of 2025 has made it possible to identify three emerging trends that will set the sector's agenda in 2026:

### 1. Generative AI

Generative AI is no longer a futuristic promise; it has become an operational reality that's redefining the boundaries of customer experience and operational efficiency. Tourism services must go beyond simple task automation and integrate AI as a strategic pillar to develop new service models, optimize data management, and ensure hyper-personalization that is truly relevant and anticipates the needs of the guest.

## 2. Climate seasonality

Climate-adaptive tourism arises as a response to the intensification of heat waves, droughts and extreme events. Destinations and companies that are able to adapt their offer, infrastructures and communication to the new climatic conditions, and to offer safety and comfort in any scenario, will gain a competitive and reputational advantage.

## 3. Cybersecurity as a Pillar of Trust and Differentiation

Mass digitization and AI integration have increased exposure to cyber risks. Cybersecurity ceases to be a technical aspect to become a strategic pillar of trust, reputation and differentiation. Hotels that ensure data protection and operational continuity will be preferred by customers, partners and regulators.

This update of the ILUNION Hotels trends report reflects the evolution of the sector over the last year and anticipates the challenges and opportunities that will define success in 2026.

Adapting, innovating and leading in these new axes will be key to continue building a more sustainable, safe and inclusive tourism.

# Introduction

In tourism, the hotel industry is facing an increasingly complex landscape, where emerging shifts are redefining how hotels operate.

Changing Traveler Preferences Redefine How Hotels Operate and Engage with their customers, giving rise to **new tourism models**. This report presents the key trends that are shaping the tourism sector today to shape the hotels of tomorrow. Talking about trends not only reflects the transformation of the market, but opens the door to **significant opportunities for innovation, competitive differentiation, and growth in the hospitality industry**.

Sustainability and environmental responsibility are fundamental pillars for tourism, driven by the growing awareness of the impact of climate change on a responsible sector of approximately 8% of global greenhouse gas emissions. In this context, the adoption of sustainable practices and the implementation of business impact reduction and mitigation policies become imperative to reduce the environmental footprint and ensure the long-term resilience of hotel activity. Especially to **a consumer that increasingly prioritizes sustainability in its purchasing decisions** and a regulation This is a growing growth that implies an increase in operating costs and greater operational complexity.

This shift in business decisions around consumer priorities is part of a complete transformation of the tourism experience, where travelers seek unique experiences, tailored to their tastes and preferences. This **need for personalized experiences pushes hotels to implement innovative strategies and increase the use of artificial intelligence technologies or big data analytics** to anticipate guest needs and offer tailor-made services. Studies support that betting on the personalization of the offer of goods and services not only increases customer satisfaction and loyalty, but also translates into an increase in sales and reputation. To achieve this, it is necessary to advance in the digitalization of the hotel industry. Technology streamlines internal processes, boosts the offer of personalized services and responds to contracting needs, as evidenced by the fact that more than 67% of consumers make their reservations online.



In this context, innovation in hotel companies is consolidated as a strategy of resilience and competitiveness. At a time when geopolitical, social and technological changes are taking place at an unprecedented speed, having **agile and effective reaction mechanisms** is vital to adapt to market and consumer demands. Well-trained teams in innovation and a conducive business culture will make it easier for the transformations necessary to adapt to new realities to be simple and tension-free. In an environment as competitive as tourism, innovation must be the strategy to create new products and services that allow them to adapt to the needs of customers and even anticipate consumer trends and consumer demands.

**This renewed connection with nature is also reflected in traveller preferences.** The client demands an improvement in their own well-being that leads to a growth in leisure tourism, where guests seek to disconnect and take care of their physical and mental. From spa services, yoga and relaxation activities to healthy eating options, hotels are expanding their offerings in **the face of the forecast that wellness tourism will continue to grow at a rate close to the 21% at which it has grown until 2025.**



The adaptation of the service towards more responsible practices also involves greater involvement with local agents and an internal review of the entire hotel structure, where the vision of sustainability and social responsibility starts from within. Talent management and development, especially in the face of new hybrid work models and the demand for a better quality of life is also a key element to finish building a brand with purpose. Hotels are the reflection of a more sustainable, more diverse, egalitarian and inclusive society.

This metamorphosis occurs at a time fraught with external challenges and growing concerns about resource scarcity and value chain management. Price volatility, international trade tensions, and changes in economic and monetary policies can have a significant impact on tourism demand and investment in the hotel sector. These challenges increase the risk and complexity of the activity, but tourism has **good growth expectations and a good positioning of Spain as a safe and attractive destination.**

Far from constituting a barrier, all these changes create a map of possibilities to redefine an already thriving and innovative sector, where the most important hotel experience is the most important part of the world. Fulfilling and authentic will go from offering places of accommodation to vibrant destinations that inspire, connect and enrich the lives of those who visit them.

# Climate change



## Where do we start from? State of the art

The political framework that determines climate policies in the EU and in Spain is determined by the [Paris Agreement](#), the international climate change treaty. It aims to limit global warming to well below 2, preferably 1.5 degrees Celsius, with the intention of achieving a climate-neutral planet by mid-century. **Scientific evidence suggests that there is a probability of more than 50% that the increase in global temperature will reach or exceed 1.5 °C between 2021 and 2040**, according to the [Sixth Assessment Report \(AR6\) of the Intergovernmental Panel on Climate Change \(IPCC\)](#) of 2023. The document states that adverse climate impacts are already more extreme than anticipated, thus highlighting the drastic need to reduce greenhouse gas (GHG) emissions to avoid higher levels of global warming with the social consequences that this entails.

The **tourism sector is highly vulnerable to climate change**, but it also contributes significantly to the emission of greenhouse gases. The weather can determine the length and quality of vacations and the sector is faced with the consequences of high temperatures, long droughts or extreme phenomena, such as floods. Accelerating the energy transition and reducing climate impacts is important to ensure the resilience and [sustainability of the sector](#).

The World Tourism Organization, in its [Glasgow Declaration Implementation Report 2023](#), recovers the forecast of an increase in tourism emissions of at least 25% by 2030, compared to 2016, in an unchanged scenario. A sector that accounts for around 8% of global GHG emissions, according to data from the [journal Nature](#), and where hotels and other types of accommodation represent among the

2% and 5% of the total CO2 emitted by the sector, according to [UN Tourism](#).

### *The World Tourism Organization recovers the Forecast of an increase in tourism emissions of at least 25% by 2030*

On the other hand, tourism is a major consumer of water and the demand for water increases along with the number of tourist establishments. **Hotels account for the highest rates of water consumption in the industry**, according to a study by [Water Resources Development](#).

In the hotel sector, addressing climate change and its associated problems, such as the energy transition and the water crisis, emerges as a strategic priority under the need to transform the activity to mitigate environmental impact and guarantee long-term sustainability.

In addition, **awareness of climate change has led to the adoption of standards and environmental certifications in the hotel industry**. Many hotels are looking to obtain certifications that validate their sustainable practices, such as [LEED certification](#), [Green Globe](#), or [Green Key](#). These seals not only demonstrate environmental commitment, but also respond to the growing expectations of consumers aware of the importance of supporting responsible business. According to the [Sustainable Travel Report 2023](#), 76% of tourists are looking to travel more sustainably.



## Areas of opportunity for the tourism sector

From the perspective of the energy transition, hotels have begun to adopt cleaner and more efficient technologies. The implementation of renewable energy sources, such as solar panels and cogeneration systems, is increasingly, although only 10% of hotels still have 100% green energy, [according to ECO-ONE](#). Likewise, there is a **trend towards**

**the optimization of [energy](#) efficiency in hotel management, with the introduction of Intelligent systems to monitor and reduce energy consumption.** Hotels are also implementing measures to conserve [water](#), from the installation of [recycling and reuse](#) technologies to the adoption of sustainable water management policies.



The year 2023 was extremely warm in mainland Spain, with an average of 15.2 °C (1.3 °C) °C above normal. Therefore, it became the second warmest year since records began, only surpassed by 2022, according to [measurements carried out by AEMET](#). Faced with realities like this, the importance of business policies that are committed to an environmentally conscious business model is growing: **50% of customers say they take sustainability into account when paying for a product or service, according to the [2022 Sustainability and Consumption Study](#) of the Cetelem Observatory.**

In this context, and with a sustained increase in temperature in the coming years, the tourism sector will have to rethink the suitability of some destinations in times of extreme heat or propose new destinations in areas that are consolidate as climatic refuges. At the same time, **opportunities arise to refocus tourism services on products related to climate comfort, connection with nature** or even tourism for the recovery of ecosystems or new activities such as *plugging*.



*50% of customers say they take sustainability into account when they pay for a product or service, according to the [2022 Sustainability and Consumer Study](#) by the Cetelem Observatory*



01 | CLIMATE CHANGE

OPPORTUNITY AREA 2

**Customers bet on products environmentally responsible**



More than 65% of Spaniards would increase sustainable consumption if they had reasonable prices and more than 73% would increase it if they could find it in the physical and digital spaces they already know, according to the report [The Sustainable Customer](#), by the consulting firms PwC and Uncommon. The impact that this factor has in the purchase decision makes it necessary to exercise transparency and communication by tourism companies to adjust their offer and generate new products that can attract a more demanding public. Hotels can make the

sustainability initiatives an interactive experience providing information about your **eco-friendly initiatives in rooms and public spaces, encouraging guests to participate in conservation efforts** such as the reuse of towels and linens. Offering services, such as toiletries in refillable containers, helps reduce single-use plastic waste. Sustainable behaviour can also be incentivised through discounts and motivational actions to increase customers' sense of ownership.

OPPORTUNITY AREA 3

**The circular economy is consolidated as a necessary practice**



Modifying the supply chain also means opening the door to new players in the process. In this way, opportunities arise to bet on areas such as recycling, waste management or second-hand markets, according to the ESG [In Action: 2022](#) document by the American company Alliance Bernstein.

**In fact, the global electronics recycling market will reach \$110.6 billion (€100.9 billion) by 2030**, as can be read in Research [and Markets' Electronics Recycling: Global Strategic Business Report](#).



OPPORTUNITY AREA 4

The energy transition is the Future of the World Economy



The industry that is committed to achieving net zero emissions could reach the value of 10.3 trillion dollars (9.4 trillion euros) globally by 2050, according to the report [The Global Green Economy: Understanding and capturing the opportunity](#) by the consulting firm Arup and Oxford Economics. In the text, they point out that **the transition to a greener economy entails costs for companies, but that not addressing them would cause natural disasters that would have more and more**

**negative consequences for the planet and the market. In fact, while the transition of the energy system to a sustainable model would cost 5.9 trillion dollars (5.4 trillion euros), not taking any action would entail 6.3 trillion dollars per year (5.8 trillion euros),** according to the essay [Empirically grounded technology forecasts and the energy transition](#) published in the academic journal Joule.

OPPORTUNITY AREA 5

Hotels Can Help to end the water crisis



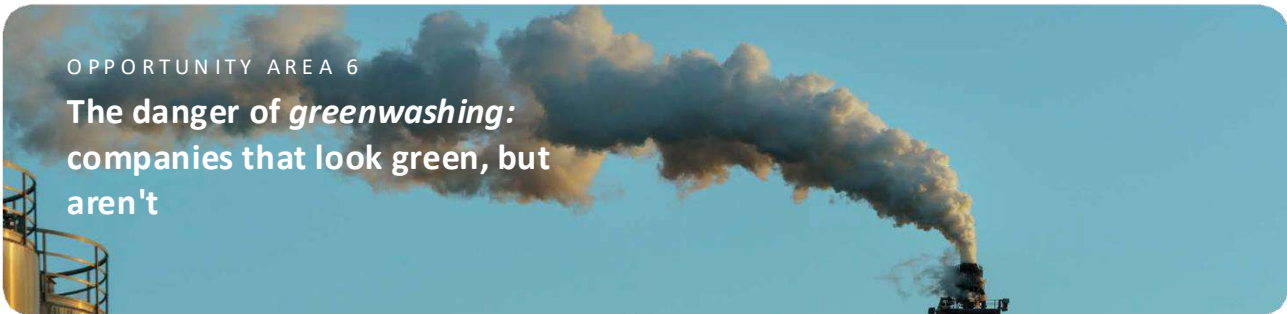
Hotel companies can contribute to ensuring the availability and sustainable management of water, as well as sanitation, by improving their practices and analyzing the management of this resource in the communities in which they operate. [The hotels](#)

[they are already implementing measures to conserve water](#), from meters and the installation of [recycling and reuse technologies](#) to the adoption of sustainable water management policies or the filling of swimming pools with seawater.

*Hotels are implementing measures to conserve water: from meters, recycling technology installations, and sustainable water management policies*



01 | CLIMATE CHANGE



OPPORTUNITY AREA 6

**The danger of *greenwashing*: companies that look green, but aren't**

One of the European Commission's objectives is to eliminate the practices of companies that appear sustainable and environmentally friendly only in appearance. That is why the agency will strengthen its surveillance to detect and sanction companies

that use European green bonds in economic practices that are not linked to sustainability, as reported by the institution on its [website](#).



OPPORTUNITY AREA 7

**New areas of interest as a result of the latest trends in mobility**

The Government of Spain has begun the [technical analysis](#) to ban short flights in Spain (lasting 2.5 hours) if there are alternatives by train, which would mean a saving of more than 300,000 tonnes of CO2 and would derive everything that passenger traffic to the railway network, according to [a report](#) by Ecologistas en Acción. This would affect more than 50,900 flights per year, i.e. a third of mainland operations and 5.9

million passengers. This change in transport dynamics makes railway stations a new point of interest for the hotel sector, as stations are transformed into transit points for travellers, with constant arrivals and departures, and opportunities are generated to accommodate passengers for short or long stays near these points.



OPPORTUNITY AREA 8

**Hotels step up to maintain and regenerate biodiversity**



More and more [hotels are looking to go one step further](#) and, in addition to trying to reduce their environmental impact and implement practices they seek to help maintain and regenerate the biodiversity of the places where they operate. Biodiversity refers to the variety of life on Earth, including the diversity of species, ecosystems and genes that interact and contribute to the balance and functioning of natural systems. Therefore, their preservation is essential to maintain the health of the planet and ensure long-term human well-being. The

By operating in various natural environments, hotels can have a significant impact on it. The [growing trend of hotels](#) to maintain and regenerating biodiversity in the places where they operate implies the **adoption of sustainable practices that conserve the flora, fauna and surrounding ecosystems**. These actions not only benefit the environment, but also they also contribute to improving the guest experience by providing attractive and healthy natural environments.

*The growing trend of hotels to maintain and regenerate biodiversity implies sustainable practices that conserve the flora, fauna and surrounding ecosystems*

Beyond concrete measures, there are different ways of approaching the transition of

strategic way and the following areas of opportunity, according to [Deloitte](#).

OPPORTUNITY AREA 9

**Energy Optimization: Transforming Hotel Efficiency**



Hotels can conduct comprehensive energy audits to identify areas where energy consumption can be reduced. This can result in small solutions, such as changing a filter or replacing lighting, or resulting in

more comprehensive solutions, such as a waste management program. Operational efficiencies can be found throughout the hotel and can often be implemented with little to no impact on the guest experience.

01 | CLIMATE CHANGE



OPPORTUNITY AREA 10

### The workforce, a Key Ally

Training staff on sustainable practices will lead to more efficient operations and can cause a ripple effect when staff bring these practices into their homes and communities. Staff can also promote practices

among guests and encourage their participation. An engaged and informed workforce is an essential asset in the energy transition.

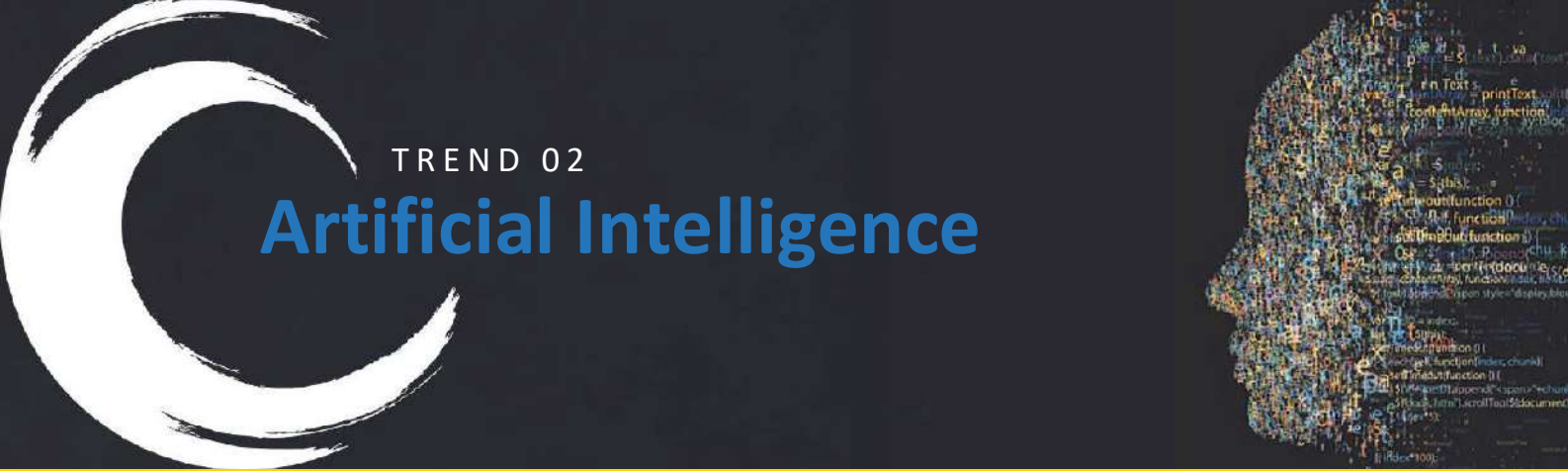


OPPORTUNITY AREA 11

### Climate risk management

The extreme heatwaves and severe weather events recorded in the summer of 2025 in Europe show that [climate change is already having a health, operational and reputational impact on eminently tourist sites.](#) This opens up an opportunity for the sector: to evolve from environmental mitigation to management

active climate risk, integrating health, safety, operational adaptation and communication to the traveller. Destinations and companies capable of anticipating and protecting the experience in extreme scenarios will strengthen their competitiveness and credibility.



TREND 02

# Artificial Intelligence

## Where do we start from? State of the art

Artificial Intelligence (AI) has gone from being an emerging technology to becoming a [strategic](#) pillar for the tourism industry and hotel. Its impact extends across the entire [customer journey and operational value chain](#), transforming the way travelers **discover, book, and experience** services, and how hotels **manage their internal processes**.

In the inspiration and search phase, generative AI and conversational models have introduced a radical change: travelers interact with intelligent assistants that understand the user's context, preferences, and budget. Platforms such as Google, Booking or Expedia are incorporating AI to offer hyper-personalized recommendations, reducing friction in decision-making.

In the operational field, AI has established itself as a tool for revenue [optimization](#), [automation of repetitive tasks](#) and [demand forecasting](#). Revenue Systems

AI-based management systems allow prices to be adjusted in real time according to elasticity, events and historical patterns, while artificial vision and predictive analytics improve efficiency in housekeeping and maintenance.

At the regulatory level, [the EU AI Act \(2024\)](#) introduces a regulatory framework that classifies systems by risk levels, obliging companies to ensure **transparency, traceability, and human oversight**. This implies that the adoption of AI in hotels must be accompanied by **governance and compliance**, especially in cases of advanced personalization and automated decision-making.

In short, AI has become a **cross-cutting layer** that redefines the guest experience, internal productivity, and competitiveness of the industry. Its adoption is not optional: it is the new standard to maintain relevance in a market where **efficiency, personalization, and trust** are critical factors.

## Areas of opportunity for the hotel sector



NEW AREA  
OF OPPORTUNITY 1.

### Hyper-personalized guest experience

AI makes it possible to design unique experiences based on behavioral data, preferences, and context. From dynamic recommendations from the web to virtual assistants that accompany the guest throughout their stay, personalization becomes a factor in

loyalty and differentiation. Integrating AI into the CRM and communication channels (WhatsApp, own app) allows you to anticipate needs and offer relevant upselling, increasing the average ticket and satisfaction.

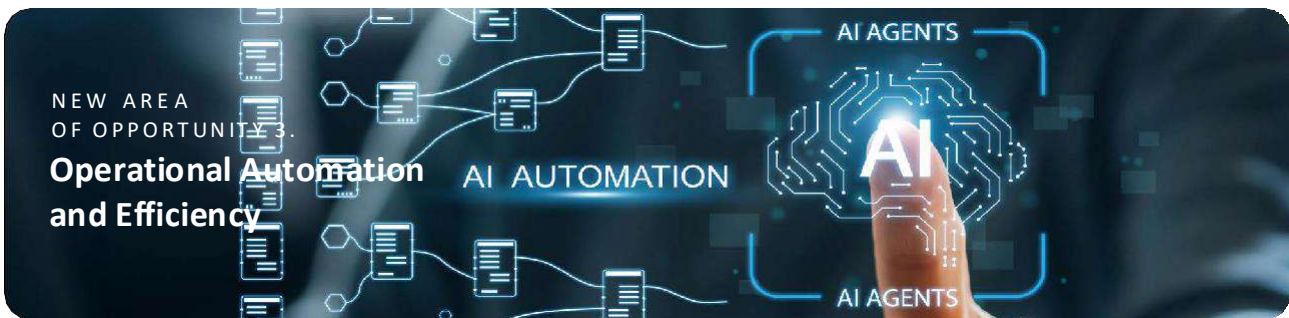
02 | ARTIFICIAL INTELLIGENCE



NEW AREA OF OPPORTUNITY 2.  
**Predictive Revenue Management**

AI algorithms analyze large volumes of data to adjust prices and availability in real time, considering variables such as local demand, events, weather and historical behavior. This allows you to maximize revenue

and optimize occupancy without relying exclusively on human intuition. AI also facilitates **targeted upselling strategies**, offering upgrades and complementary services at the optimal time.



NEW AREA OF OPPORTUNITY 3.  
**Operational Automation and Efficiency**

AI reduces administrative burden through chatbots for customer service, internal assistants for shift management, and computer vision tools for housekeeping control. In addition, predictive models anticipate breakdowns

and maintenance needs, reducing costs and improving the guest experience. This automation frees up time for staff to focus on tasks of high human value.



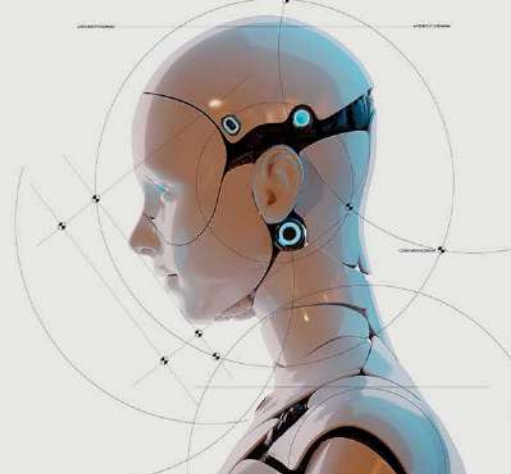
NEW AREA OF OPPORTUNITY 4.  
**Governance and digital trust**

The deployment of AI must be aligned with European regulations and ethical principles that guarantee transparency and data protection. Implement **governance frameworks**, algorithm audits, and human oversight processes

not only does it avoid penalties and strengthen customer trust. Chains that take a responsible approach will have a competitive advantage in an increasingly regulated environment.

## TREND 03

# Innovation



### Where do we start from? State of the art

Innovation is a fundamental driver for growth and competitiveness in the contemporary business world. It is defined as the process of introducing ideas, products, new or improved services, processes, or business models that generate value and improve an organization's efficiency and effectiveness.

[Boston Consulting Group](#) says that innovation strengthens economic resilience and that **the connection between innovation, growth and competitive advantage is stronger than ever.**

In addition, [innovation](#) not only drives differentiation in the market, but also allows companies to adapt to changes in consumer preferences, emerging technologies, and the competitive environment. Therefore, in the tourism sector, **innovation plays a crucial role in improving the traveler experience and the competitiveness of destinations.**

From implementing technology solutions to improve operational efficiency to creating unique experiences that surprise and delight customers, innovation, understood as a cultural transformation and business, it drives competitiveness and profitability in the hotel industry. **Brands are combining innovation with their customer experience to create unique and personalized experiences that foster customer loyalty.**

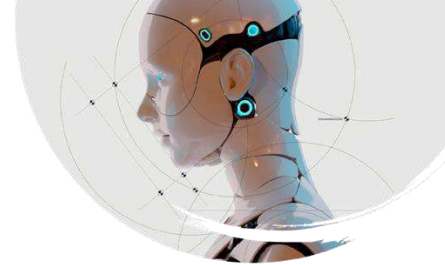
From a technological perspective, for example,

[innovative](#) hotels are adopting technologies such as the Internet of Things (IoT), AI, and automation to deliver more personalized services, improve energy efficiency, and optimize resource management. According to PwC's [Hospitality tech investment pays](#) off study, AI is also democratizing revenue management across all hotel segments. Although [a study by Accenture](#) warns that only 13% of tourism companies have the developed capabilities in this regard to unlock their potential.

As far as corporate innovation is concerned, it has been marked in the last two decades by the paradigm shift towards [open innovation](#). 95% of companies already developed this type of practice according to the latest [Open Innovation Barometer](#) by *The Economist*, while [71%](#) of organizations plan to increase their investment in open innovation practices.

In Spain, specifically, [79%](#) of companies have a business unit dedicated to open innovation. Relationship Development with *external stakeholders* helps companies exchange critical knowledge and improve competitiveness, according to the [Hospitality Innovation Industry Report](#). To continue advancing in this trend, the integration of innovation into culture and business strategy, must continue to be mainstreamed, inside and outside companies and the sector, and become a constant informed about the most outstanding success stories, technological progress and user concerns.

*Brands are combining innovation with their customer experience to create unique experiences that foster loyalty*



## Areas of opportunity for the hotel sector

Innovation in the hotel sector ranges from the design of spaces to the optimisation of the services offered, the deployment of latest digital technologies to the establishment of synergies with other industries to import new

business ideas. To harness the potential of innovation in all its aspects, **it is necessary to foster an innovative company culture in itself, and to provide staff with tools to soak up this vision.**

### OPPORTUNITY AREA 1

#### Decentralized innovation



As a transversal effort to business processes, this conception of innovation involves employees at all levels in contributing creative ideas for business development. The multiplicity of perspectives increases the chances of success (diversity [is directly](#) related to a

more innovative decisions), and involvement in an innovative company fosters team engagement and satisfaction (up to 82% of business leaders surveyed in the [Risk vs. Reward: Innovation in modern enterprises report](#) by the collaborative platform Miro believe that it helps attract and retain talent).

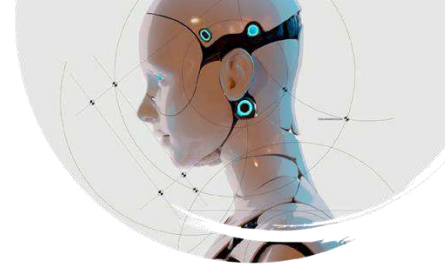
### OPPORTUNITY AREA 2

#### Intrapreneurship culture



Corporate entrepreneurship is gaining strength, with 80% of IBEX 35 companies already developing some type of initiative in this area, according to the [III Report on Corporate Entrepreneurship in Spain](#). Specifically, 70.5% have intrapreneurship programs to provide Opportunities to their teams to ideate new business ideas and improve. However, only between 5 and 10% of the workforce participates in these, on average. There is, therefore, the possibility of continuing to implement a authentic intrapreneurship culture, which is

Extend to all teams and lead to organizational and cultural changes. In addition to developing specific programs for potential pilots, Companies can foster the spirit of internal entrepreneurship with strategies that reward innovative initiative among their employees, such as corporate communication that contributes to the public recognition of intrapreneurial achievements, incentive programs, the celebration of events and competitions such as *hackathons* and the creation of *innovation labs* for experimentation and creativity.



03 | INNOVATION

OPPORTUNITY AREA 3

**Innovation Ecosystem**



76.4% of the companies surveyed by the Santander International Entrepreneurship Centre (CISA) for its [III Report on Corporate Entrepreneurship in Spain](#) develop some type of open innovation programme, while 74.3% collaborate with companies in their sector, 71.1% have acceleration programs, and 60% make *corporate venture capital* investments. The combination of these collaboration opportunities is shaping up to be an evolution of the concept of open innovation towards that of true [open tourism](#). From external *venture studios* that help turn the

ideas developed in intrapreneurship programs in landed businesses; acceleration, incubation and *startup scouting* programs to attract ideas and innovative talent; alliances with other organizations; M&A strategies, the creation of a *corporate venture building* space within the company that identifies and promotes entrepreneurial projects from their foundations, the establishment of a business *investment vehicle*; *Corporate Venture Capital* to support strategic areas for the company..., there are many synergies that the sector can explore.

OPPORTUNITY AREA 4

**Persistent intelligence market and customer**



[A study by Deloitte](#) showed that the fastest-growing companies spend more time on the exploration of the market in search of trends and ideas rather than internal *brainstorming* of innovation opportunities, and that focus more on the detection of new technologies and changes in the market versus identifying opportunities to optimize existing operations. To make the most of the potential of innovation surveillance, companies must rely on a structured

organized to obtain competitive intelligence, as a **permanent observatory**, which allows the search for trends to be transformed from an isolated and sporadic initiative to a systematic effort to seek continuous innovation. A holistic and [customer-centric](#) trend analysis will also help companies obtain market intelligence not only based on [the most innovative companies](#) and direct competition, but also to the needs of a changing audience.



OPPORTUNITY AREA 5

**An improved user experience**  
**Automation and optimization for**

Technology is the main protagonist of business innovation strategies, as shown by the [Global Innovation Index 2023](#). Artificial intelligence, as a result of the advancement in the understanding and processing of natural language from large language models, promises to have a significant impact in improving the user experience and increasing efficiency in all industries. A [Deloitte](#) report shows that up to 91% of business and technology leaders predict that generative AI will help improve productivity, while 72% of the [13,000 consumers surveyed by Adobe](#) believe it will help them improve their user experience. In the tourism sector, specifically, AI allows the customer to be accompanied throughout the process of

purchase, from the moment of [booking](#) to check-out, through **chatbots and virtual assistants** that help manage queries and to give quick answers. These conversational interfaces also offer permanent availability, which reduces the workload of staff and improves customer satisfaction, according to the [analysis of Info Tech Research Group](#).

AI also makes it possible to process large amounts of data to personalize the customer experience: through **learning algorithms** **Automated and data analysis**, it makes it possible to offer information on local attractions, activities and restaurants based on customer habits, create personalized itineraries and recommend more products to users.



OPPORTUNITY AREA 6

**Innovation as a competitive advantage**

Innovation ceases to be a set of specific initiatives to consolidate itself as a **structural capacity of the tourism sector**.

Systematically integrating it into strategic decision-making allows us to anticipate changes in demand, adapt with greater agility to volatile environments and better respond to new customer and territory expectations.

**When innovation is directly connected to the business, it becomes a sustained [source of differentiation](#)**, efficiency and resilience, strengthening the sector's competitive position in the medium and long term.

# TREND 04 Cybersecurity as Hotel Confidence Axis



## Where do we start from? State of the art

Cybersecurity has ceased to be a technical issue and has become a **strategic pillar of trust and reputation** in the tourism industry. The global cost of cybercrime will reach **\$10.5 trillion by 2025**, making it the world's third-largest "economy", behind only the US and China ([Cybersecurity Ventures\[1\]](#)).

This scenario reflects the magnitude of the risk: data loss, disruption of operations, regulatory sanctions, and most of all, erosion of customer trust.

The hotel sector is a priority target for cybercriminals due to volume and sensitivity of the data it handles: personal, financial, and travel information. According to IBM, the hospitality industry is among the ten most attacked sectors globally ([Enthec\[2\]](#)). In Europe, cyberattacks on tourism increased by 60% in 2024, with peaks in high season ([Panda Security\[3\]](#)). The most common threats include phishing, ransomware, and attacks on Wi-Fi networks,

which can paralyze critical systems such as PMS, payment gateways or digital check-in ([WTW\[4\]](#)).

In addition, the NIS2 Directive and the GDPR impose strict obligations in terms of risk management, incident reporting and governance, with penalties that can reach 2% of global turnover ([INCIBE\[5\]](#)). Failure to comply can lead to fines, but also an irreversible reputational impact: more than 60% of consumers stop hiring a company after a data breach ([Fiberlux\[6\]](#)).

Finally, the human factor remains the first line of risk: 95% of incidents originate from human error ([Coursebox\[7\]](#)). This makes awareness and continuous training an imperative to protect corporate assets and empower employees in their personal lives, reinforcing the culture of security as a social and labor benefit ([Cyberso\[8\]](#)).

## Areas of opportunity for the hotel sector

NEW AREA  
OF OPPORTUNITY 1.

**Cybersecurity as a factor  
of trust and differentiation**



Guests expect their information to be just as protected as their physical experience. A robust cybersecurity strategy **reinforces the value proposition** : privacy, security

and trust. Hotels that communicate their protection protocols (e.g., AES-256 encryption, multi-factor authentication) generate **advantage** and reduce the risk of cancellations due to mistrust ([Track Vigilante\[9\]](#)).



04 | CYBERSECURITY AS THE AXIS OF HOTEL CONFIDENCE

NEW AREA OF OPPORTUNITY 2.

**Cybersecurity culture and employee well-being**



The **informed employee is the first line of defense**. Awareness programs reduce incidents and, in addition, provide social value: teaching how to protect personal digital identity improves satisfaction and reduces associated stress

to fraud (Efficient Insurance[10]). Incorporating cybersecurity as a **corporate benefit** (e.g., workshops for families, identity insurance) impacts **engagement and talent retention** . due to mistrust ([Track Vigilante\[9\]](#)).

NEW AREA OF OPPORTUNITY 3.

**Digital resilience and operational continuity**



Ransomware attacks can cripple bookings and payments. Implement continuity plans, encrypted backups

and network segmentation (guests vs. management) reduces the impact and ensures the customer experience even in crisis ([INCIBE\[11\]](#)).

NEW AREA OF OPPORTUNITY 4.

**Cybersecurity as a lever for the Industry collaboration and risk-sharing management**



The growing sophistication of cyberattacks and the interconnection of tourism systems (PMS, OTAs, payment gateways, technology partners, external service providers) have shown that digital security can no longer be addressed in isolation by each company. **The**

**The hotel sector has the opportunity to lead the creation of collaborative cybersecurity ecosystems, promoting sectoral alliances, joint response protocols and threat intelligence sharing platforms.**

NEW OPPORTUNITY AREA 5.

**Cybersecurity as a differentiating element in the offer of premium services and loyalty.**



Premium and corporate customers demand additional guarantees of privacy and data protection, especially on business trips, events or extended stays. **The hotel industry can create customized cybersecurity services**

**as part of its value proposition:** rooms with reinforced Wi-Fi and private networks, secure data erasure services after check-in. out, digital advice for executives, or even identity protection insurance included in loyalty programs.

## TREND 05 Climatic Seasonality

### Where do we start from? State of the art

Climate **change** is transforming the way people travel. [Extreme heatwaves in Europe during 2025 have marked a turning point: higher temperatures at 45 °C in Mediterranean destinations](#), temporary closures of iconic attractions (Acropolis, Eiffel Tower) and health alerts due to "heat stress" have shown that [heat can be an operational and reputational risk for tourism](#).

This phenomenon is driving a [shift in seasonal and geographical demand](#): travellers are looking for **cooler destinations** (Northern Europe, Northern and **move their vacations to spring and autumn** to avoid extreme heat. According to **Morgan Stanley Research**, heat waves are already a **key driver in the choice of destinations and activities**, consolidating the trend of "**coolcations**" (trips to more temperate climates). The European Commission, through the **Joint Research**

**Centre** projects that southern Europe will lose share in summer, while medium seasons and climate-adapted destinations will grow.

[The adaptation of the hotel sector is, in this context, essential](#). This adaptation goes **beyond physical infrastructure** (air conditioning, materials) to focus on **operational and commercial management**. Tourist establishments

They must guarantee **thermal comfort, safety and well-being** as pillars of their proposal of value. This circumstance may involve the **redesign of operating calendars and schedules**, the curation of **experiences adapted to the climate** or the implementation of dynamic **pricing** that integrates environmental comfort indices, transforming the climate challenge into an opportunity for business differentiation and resilience.

### Areas of opportunity for the hotel sector



Extreme heat forces us to rethink the experience: more shaded areas, **swimming pools and aquatic spaces, efficient air conditioning** and activities

at adapted times (morning/afternoon). Incorporating **indoor wellness**, climate shelters and light menus reinforces the perception of care and safety.



05 | CLIMATIC SEASONALITY



NEW OPPORTUNITY AREA 2.

**Deseasonalization and pricing for comfort**

The shift towards **spring and autumn** opens the door to **revenue management** strategies based on **thermal comfort indices**. Offering "climate friendly" packages and adjusting rates

Depending on the perceived temperature, it allows to soften the dependence on summer and optimize occupancy.

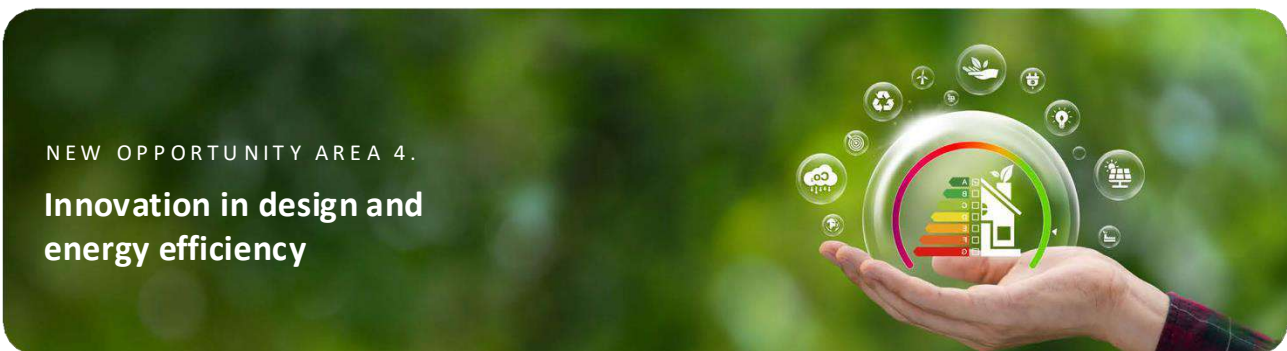


NEW OPPORTUNITY AREA 3.

**Climate communication to build trust**

Travelers are looking for **information and confidence**. Communicate measures such as **heat alerts, hydration protocols, and cool spaces**

generates security. Positioning the hotel as "**climate adaptive**" reinforces the brand and attracts segments sensitive to sustainability.



NEW OPPORTUNITY AREA 4.

**Innovation in design and energy efficiency**

Investing in **bioclimatic architecture**, green roofs and passive cooling systems reduces dependence on air conditioning, improves

resilience and reduces energy costs, aligning with ESG objectives.

## TREND 06

# Sustainability Regenerative



### Where do we start from? State of the art

Nature, with its intricate network of ecosystems and the biodiversity it hosts, is the cradle of life on our planet. Throughout history, humanity has maintained a close connection with nature, finding in its resources an essential source for its existence. However, [Accelerated population](#) growth and the expansion of human activities have led to significant environmental challenges, such as [rising global temperatures](#), threatening the health and [resilience of ecosystems](#).

**Human action has already altered more than 70% of the entire ice-free surface**, according to United [Nations data](#), which in addition to modifying Land for agricultural use means the loss of habitat and the risk of extinction for many plant and animal species.

Tourism, in the human quest for exploration, knowledge and connection, has experienced an [exponential](#) growth in recent decades. This expansion, while providing economic and cultural opportunities, has also left a considerable ecological footprint, including in [protected natural areas](#). [UN Environment](#) research points out that the consumption of resources by the tourism sector – energy, water, land and materials (such as fossil fuels, minerals, metals) and biomass) – is growing proportionally with its generation of solid waste, wastewater, biodiversity loss, and greenhouse gas emissions. The agency warns that, in a "no change" scenario, **tourism would generate an increase of 154% by 2050 in energy consumption, 131% in greenhouse gas emissions, 152% in water consumption and 251% in solid waste disposal**. These data

increase concerns about the conservation of the natural environment and long-term sustainability. In this context, the hotel sector, as an integral part of the tourism industry, has played a [significant](#) role in the interaction between travelers and the natural environment. The operation of accommodations has traditionally been a [resource-intensive](#), waste and [greenhouse gas intensive enterprise](#).

In the face of this, **new alternative tourism models and regenerative sustainability are emerging as a transformative paradigm**. Go more beyond mere sustainability, seeking not only to minimise the environmental impact but also to actively contribute to the restoration and revitalisation of destinations affected by tourism activity. Nature would not be the only beneficiary of this trend, the [World Economic Forum](#) speaks of the need to bet on "regenerative business" instead of just sustainable ones, in the face of a world of finite natural resources and the high impact of human activity.

*In an unchanged scenario, tourism would generate an increase of 154% in energy consumption and 152% in energy consumption by 2050.  
Water*



## Areas of opportunity for the hotel sector

Regenerative sustainability represents an opportunity for the hotel sector to not only minimize its environmental impact but also actively contribute to the revitalization of destinations and communities. [New Zealand](#) is the great example of this model, since in 2021 it launched a national tourism regeneration plan under the premise that **tourism must**

**not only providing economic value, but also helping to protect and restore the environment.** This approach encompasses sustainable practices in hotel operations, initiatives to regenerate tourist destinations and the promotion of sustainable mobility, setting a new standard for responsible tourism that is aware of the importance of preserving the environment.



The hotel sector has the opportunity to lead the way in creating destinations that are not only sustainable, but also regenerative. This means adopting design practices that not only minimize environmental impact, but also regenerate local ecosystems and promote biodiversity. The [hospitality](#) sector has an opportunity to adopt **sustainable and regenerative design practices in the construction and**

**renovation of accommodations**, from the use of recycled and biodegradable materials to the implementation of landscaping systems that restore the surrounding ecosystems and the integration of architectural solutions that maximize energy efficiency, while encouraging the use of renewable energies and optimizing [energy and water consumption](#).



Building trusting relationships with local communities will help ensure that sustainability initiatives not only benefit the natural environment, but also local people, as [this analysis](#) with case studies in

Mexico and Chile. It is advisable **to involve communities in regeneration projects** to generate a positive impact and foster [local acceptance](#).



06 | REGENERATIVE SUSTAINABILITY



In line with the regenerative philosophy, hotels can bet on promoting and facilitating mobility options focused on supporting the regeneration of destinations. The [Future of Mobility](#) report by McKinsey states that mobility is one of the most dynamic sectors today and is immersed in complex changes that will transform it until 2035, and it is that private cars are used in 45% of all trips, surpassing public transport, micromobility (scooters, bicycles, scooters, etc.), shared trips or walk. **By prioritizing green mobility, hotels can contribute to the regeneration of urban ecosystems and reduce their footprint environmental protection**, in addition to taking advantage of the opportunity

and position itself, facilitating and promoting [sustainable mobility options for guests](#), such as bicycle rental, electric vehicles and enhancing access to public transport or collaborating with local companies to implement solutions of shared mobility. Adopting practices that encourage the [circular](#) economy such as waste recycling, product reuse and waste reduction will also help regeneration. Some of these best practices for hotels are included in [a recent detailed](#) guide from the European Commission. These practices can be supported by local suppliers that follow circular economy principles to close the cycles of the life of materials and reduce dependence on virgin resources.



It is necessary to implement systems for monitoring and measuring the hotel's environmental footprint, for which there are already some [popular tools](#) and [methodologies](#), setting targets to reduce resource consumption and emissions. The

Transparency in these efforts can increase the confidence of customers committed to the environment and, above all, the measurement and the analysis of the information will allow hotels to **adapt their regeneration strategies and practices.**



Regenerative sustainability is maturing as a sectoral agenda driven by the holding of more and more [strategic forums and dialogues](#) that are promoting new lines of financing aimed at impact.

This opens an **opportunity to structure projects aligned with environmental, social and economic regeneration, facilitating access to public and private funds.**



## TREND 07

# Overregulation Sustainability-related



### Where do we start from? State of the art

The growing global awareness of the importance of sustainability has led to an increase in the regulation on the matter. The urgency of addressing environmental challenges, such as climate change, biodiversity loss, and pollution, has prompted governments and international bodies to implement **stricter policies to mitigate the negative impact of human activities**. As a result, companies are facing the arrival of a continuous trickle of regulations, laws and directives in the field of sustainability, a **growing pressure regulatory crisis** that, in most cases, comes from the institutions of the [European Union](#), as recognized by [the UN Global Compact](#).

For this reason, the agency has developed a [legislative search](#) tool on corporate sustainability, where essential regulations such as [Directive \(EU\) 2022/2464](#) on sustainability reporting or the [Law/2021 on climate change and energy transition](#) appear, which

It establishes the obligation to publish reports on risks arising from the activity, to set specific objectives and decarbonisation investments and the possibility of calculating and offsetting polluting emissions.

There are also important pieces of legislation under development or pending approval, such as the [Sustainable Mobility Act](#); the [Law on Loss Prevention and Food Waste Prevention](#); the [Corporate Sustainability Due Diligence Directive](#); to improve the protection of human rights and the environment, or the [Green Claims Directive](#), which seeks to set **common criteria against greenwashing and misleading environmental claims**.

The tourism sector is no stranger to this '[regulatory tsunami](#) ', which is also made up of regulations such as [Royal Decree 1055/2022](#) on packaging and packaging waste, [Royal Decree 14/2022](#) with energy efficiency measures, ISO 14001 environmental management regulations and [Law 7/2022](#) of waste and contaminated soil for a circular economy. All these regulations applicable to the hotel sector go hand in hand with consumer pressure, with **tourists seeking to minimise their ecological impact** and where sustainability gains prominence in consumption decisions.

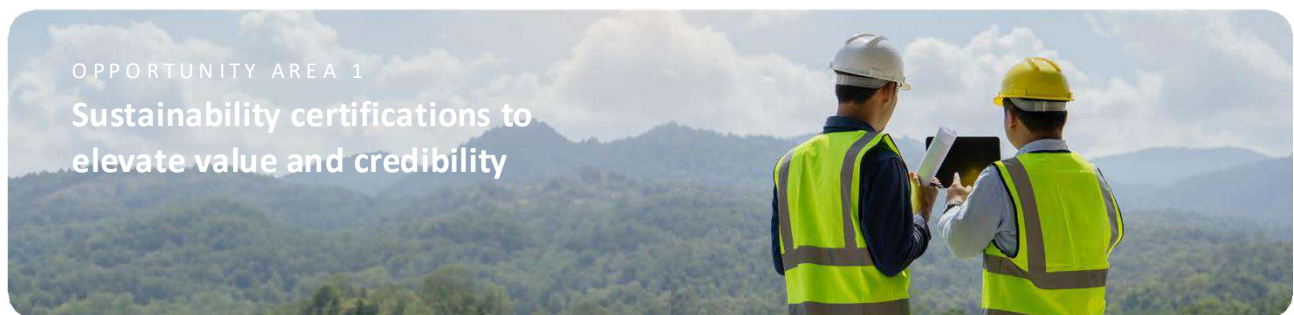


## Areas of opportunity for the hotel sector

While initiatives to encourage more sustainable practices are critical, as EY's [The Regulatory Tsunami report acknowledges](#), **over-regulation can pose challenges for companies by imposing a burden additional administrative** and increase compliance costs. In addition, the lack of harmonization and the diversity of requirements between regions also complicate sustainability management for hotel companies operating in multiple locations.

In the hotel sector, this regulation is manifested in the need to comply with

stricter standards in areas such as energy efficiency, waste management, responsible water use and emissions reduction. In fact, the implementation of these measures is moving in the right direction, as evidenced by the fact that **Spain is one of the last places in the [Comell Hotel Sustainability Benchmarking Index's energy, water and carbon consumption rankings](#)**. Knowing the regulations and the context will help hotels to find some advantages and opportunities within this 'tsunami'.



OPPORTUNITY AREA 1

### Sustainability certifications to elevate value and credibility

Certification [will increase the value of assets](#) and support compliance with social and environmental regulations. Among the most important certifications [ISO 14001](#) is a global environmental management tool adopted by hotels and restaurants to certify their commitment to sustainability. This standard establishes requirements for implementing environmental management systems, preventing, reducing or controlling impacts while maintaining a socioeconomic balance. Although ISO 14001 is not mandatory, many hospitality organizations opt for it because of its ability to improve

environmental performance and customer satisfaction. Its adoption can [help hotels](#) reduce their environmental impact, optimize resources, and manage waste efficiently. In addition, being certified can result in increased sales and revenue, as it demonstrates a visible commitment to sustainability and can [improve customer perception](#). This standard also encourages the periodic assessment of legal compliance, ensuring that that establishments comply with applicable environmental regulations and avoid possible sanctions.



07 | SUSTAINABILITY-RELATED OVER-REGULATION

OPPORTUNITY AREA 2

**Green bonds, the ace in the hole of sustainable finance**



Green bonds can represent a strategic opportunity for sustainable tourism, aligning regulations and financing with environmental goals, according to this Cornell University analysis. [BNP Paribas Markets plans to issue green bonds of 600,000 million dollars \(about 517,800](#)

[million euros\) this year](#), which will increase to 850,000 million in the next two years. With this growing demand for responsible investments, the issuance of green bonds in the sector is presented as a way to finance projects that improve energy efficiency, promote the conservation of destinations and promote sustainable practices.

OPPORTUNITY AREA 3

**Aligning hotel management with ESG indicators**



The growing importance of environmental, social and governance (ESG) criteria in the [financial field](#) presents an [unparalleled](#) opportunity for hotels immersed in a sustainable regulatory environment, recognizing that effective management of these aspects not only mitigates risks, but also unlocks investment opportunities sustainable. An example of this is **the increase in investment in assets managed under ESG criteria, which exceed already 374,700 million euros**, according to the

[Sustainable and Responsible Investment in Spain 2023](#) study, by Spainsif, the benchmark platform for this type of investment. Hotels [that incorporate practices and strategies aligned with ESG](#) principles can benefit from the growing demand for socially and environmentally responsible investments. [Hosteltur](#) stands out the example of the Villa Le Blanc Gran Meliá hotel, in which the REIT Atom has invested €32 million to help the establishment to equip itself with sustainable infrastructure.

OPPORTUNITY AREA 4

**Rigour and traceability as a competitive advantage**



The tightening of the regulatory framework on sustainability at the European level, especially the [entry into force of the Directive against greenwashing](#), is shifting the focus of the discourse towards evidence and traceability. This context opens up a strategic opportunity for the tourism sector: **to transform the ability to measure, verify, and report**

**Environmental and social impacts on a competitive asset as a differentiating factor.** Transparency and rigour strengthen the reputation of the tourism industry, [facilitate access to sustainable financing](#) and reinforce the confidence of customers, investors and institutions.

# Managing Resource Scarcity: The Hotel Industry Value Chain



## Where do we start from? State of the art

Despite the strong economic disruptions of the last four years, [the world](#) economy has shown remarkable resilience in the face of the crisis resulting from the pandemic, supply problems, inflation and monetary policy adjustments, according to the [Global Economic Prospects report](#) of the World Bank. The organization welcomes the recovery of global supply chains and highlights the good performance, especially in the last year, of exports of services, including [tourism](#).

However, the economy has also been affected by geopolitical tensions and, especially in Europe, by the war in Ukraine and the resulting energy crisis, which has highlighted the **vulnerabilities that can arise in increasingly complex and concentrated supply chains**, as explained by the [World Economic Outlook 2025](#) report by the IEB Economic Institute. This reality, coupled with the global climate crisis, highlights the need to improve the resilience of value chains.

[The United Nations](#) warns that **climate change is a threat multiplier**, as it intensifies the scarcity of resources and worsens the situation of social, economic and environmental factors. An example of this is the situation in the industrial sector, where 91% of companies suffer the effects of resource scarcity, which has led 67% of them to increase their investment in circular economy initiatives, according to the study [Circularity: no time to waste](#). In general, **raw materials are the scarcest commodity, followed by energy and labor**.

This concern reaches the tourism sector, with a [high consumption of resources](#) and with significant challenges in terms of [sustainability](#) and responsible use. In addition, [studies](#) support the idea that the exploitation of natural resources has a detrimental impact on the sector's income and tourism demand. In this context, hotels play a crucial role in mitigating these problems and promoting more sustainable and efficient practices.

In the hospitality industry, [resource scarcity](#) translates into **operational and financial challenges**, as well as the **need to adapt to a stricter regulatory environment** for sustainability. Hotels rely heavily on resources such as water, energy, and food, and inefficient management of these resources can have a [significant](#) impact on their profitability and reputation.

**In the hospitality industry, resource scarcity translates into operational and financial and in stricter sustainable regulatory environments**



## Areas of opportunity for the hotel sector

The [World Tourism](#) Organization explains that, as a cross-cutting economic sector, tourism has an extended and fragmented value chain that requires the collaboration of

a wide range of stakeholders, from different levels and branches of government to the private sector and civil society.



### OPPORTUNITY AREA 1 Collaboration to optimize The hotel value chain

By collaborating effectively with the rest of the agents in the [value chain](#), they can identify and more efficiently address challenges related to resource scarcity and sustainability in general. This can include building strategic alliances, improving supplier relationships, engaging in sustainable development initiatives and coordination in the implementation of

responsible, according to the firm specializing in supply chains [GEP](#). Hotels can lead and participate in initiatives to promote sustainability and responsible resource management with **environmental certification programs, promote good practices among suppliers, and raise awareness among guests** on the importance of reducing your environmental footprint during your stay.



### OPPORTUNITY AREA 2 Implementing more sustainable and efficient practices in the hotel sector

Concrete measures need to be taken to reduce environmental impact and optimize the use of resources in hotels, as explained in the article [Green Supply Chain Management in Hotel Industry: A Systematic Review](#). This involves implementing water and energy conservation practices, such as [installing water-saving devices](#) and [utilizing fountains renewable energy](#). To this end, [technological advances such as Artificial Intelligence](#) offer

opportunities to **improve resource efficiency, from smart energy management systems to water recycling and reuse solutions**. In addition, work can be done on reducing food waste and promoting sustainable agriculture practices in the food supply chain. The use of certified environmental management systems and the adoption of responsible purchasing policies are also important.



08 | MANAGING RESOURCE SCARCITY



There is a need to strengthen the capacity of tourism value chains to address challenges related to resource scarcity. Analyze sources of supply, develop [contingency plans](#) for emergency situations, and foster innovation in resource management to ensure operational continuity even in adverse environments. Hotels can reduce their vulnerability to resource shortages by maintaining **good inventory management**, **diversifying their supplier base**, and **building strong relationships with multiple trading partners**. Find local suppliers and

regional resources can help minimize the risks associated with dependence on imported resources and ensure a more sustainable supply. Examples include some recent initiatives, such as this Sustainable [Hospitality Alliance project](#) to improve the local supply chains of several hotel chains in eight African countries. In addition, it is crucial to improve the efficiency of [logistics processes](#), from receiving goods to storage and distribution, to help reduce waste and optimize the use of resources along the value chain.



Water and energy scarcity is consolidated as a structural variable in the tourism sector. Migrate to **deeper operational efficiency models** —[real-time measurement, consumption reduction and circular economy](#)— reduces dependency of critical resources, mitigates operational and climate risks and improves service continuity.

In addition, it generates savings, strengthens ESG reputation and prepares assets for more demanding regulations.

# Collaborative economy



## Where do we start from? State of the art

The exchange of goods and services on digital platforms between users has registered a [meteoric rise](#) in the last ten years, transforming the way people share resources, goods and services. The trend is expected to continue and **the global sharing economy is expected to increase to market value of 793,680 million dollars** in 2031 (728,972 million euros), compared to 150,000 million dollars in 2023 (137,770 million euros), a growth of 32% annually, according to the analysis firm [Proficient Market Insights](#).

Tourism and the hotel sector have not been immune to this revolution. Collaborative economy platforms such as [Airbnb](#) or [Uber](#) have redefined the way travelers find accommodation and get around, **challenging traditional industry models**, as the [World Bank](#) acknowledges.

The sharing economy has become ingrained in modern culture due to factors such as accessibility to technology, ease of access, the search for authentic experiences, and

the preference for more personal interactions. In the tourism field, travelers are not only looking for places to stay, but [also unique experiences](#) that reflect the authenticity of the destination, being seen as people and not just as consumers, according to this [Accenture analysis](#).

Already at the birth of this trend, the consulting firm [PwC](#) predicted that tourism, especially in the accommodation branch, would be one of the five economic sectors with the greatest potential in this area, altering the business status quo. In the [hotel sector](#), this phenomenon has posed challenges and opportunities. On the one hand, it has increased competition and required hotels to rethink their strategies to attract travelers. On the other hand, it has promoted innovation and personalization of services to adapt to changing consumer demands, which **has increased the connection with guests and social presence of hotel companies**, according to the study [The sharing economy in the hospitality sector](#) of the journal Nature.



## Areas of opportunity for the hotel sector

The rise and success of the collaborative economy; [led by accommodation, transport or delivery platforms](#) , has transformed the rules of the game in the hotel sector, but the entry of new accommodation models has driven dynamics of [adaptation of the traditional actors in the tourism sector](#), which leaves room to maintain competitiveness. As this Boston [Hospitality Review article explains](#), hotels aren't just looking to add attributes and home-sharing experiences to their properties to compete in

more effectively, but also seek to take advantage of the general business model based on the collaborative economy. In essence, **they are adapting their traditional approach to include elements of the sharing economy, such as community engagement and resource sharing.** The hotel industry has the opportunity to transform challenges into advantages, leveraging innovation and adapting to the changing expectations of modern travelers.

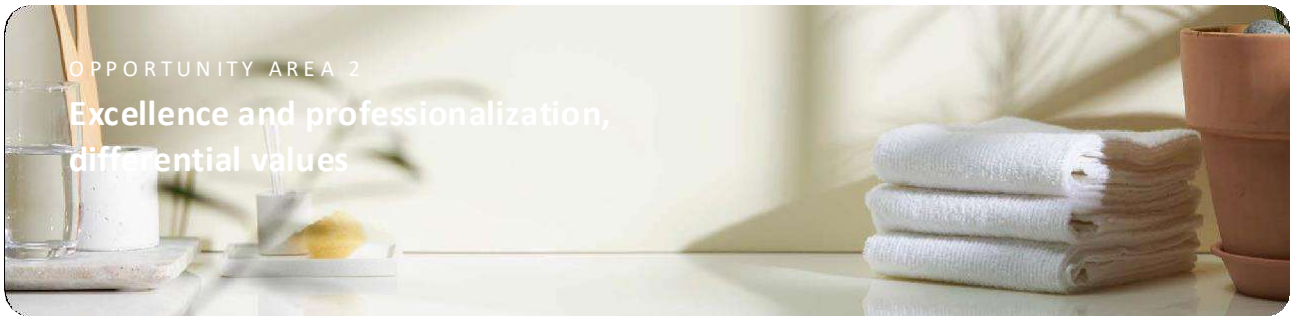


Hotels must continue to develop green initiatives and integrate sustainable practices into their management, aligning with the growing demand for sustainable development options. environmentally friendly travel. The growth of the sharing economy and shared consumption also means that customers are increasingly asking companies to actively engage with the community and have a greater social impact. **The collaborative economy implies reuse of goods and services**, which are shared,

as a way [to contribute to sustainability](#). Environmental awareness is a growing trend and hotels can stand out by adopting sustainable practices in their operations and promoting **collaboration with local initiatives** to minimize environmental and social impact, as explained in the report [A sustainable future for travel](#) by the travel agency Intrepid Travel. For example, activities that are respectful of the environment, community volunteering programs or joining local recycling and waste management systems.



09 | COLLABORATIVE ECONOMY



OPPORTUNITY AREA 2

**Excellence and professionalization, differential values**

One of the advantages offered by hotels is the constant quality of [their services and professional customer service](#), something that is difficult to match for collaborative economy services that connect a customer with another individual as a provider. [Marketing](#) strategies that emphasize this **difference, and**

**Professionalization of services** can benefit hotels when it comes to attracting and retaining customers. In this sense, the rewards and loyalty programs that hotels have are also an advantage over collaborative economy models, especially in [business travel](#).



OPPORTUNITY AREA 3

**Strategic alliances in collaborative tourism**

Establishing strategic partnerships with sharing economy platforms to expand visibility and attract new customer segments or partnering with landlords who offer services in the local community, is a good way to capitalize on the sharing economy. Some hotels are already taking advantage of Airbnb by publishing their inventory on the platform through hotel management platforms

such as CloudBeds, according to Hotel [Tech Report'](#) s **analysis. Collaboration may include exclusive offers, joint promotions, or integration of services.** Taking collaborative business models as an example, the hotel industry can create online communities, exclusive membership programs or additional services in collaboration with local suppliers, in addition to offering them its own services.



09 | COLLABORATIVE ECONOMY



OPPORTUNITY AREA 4

Security in the face of regulatory uncertainty and the risk of gentrification

Various studies support the impact that platforms such as Airbnb and short-term rentals have had on residential communities and the rise in rental prices. This, coupled with the lack of standardization and regulation compared to traditional hotels, according to the European Parliament, fragments the market and could lead to potential risks to guests, as this analysis also explains

of the University of Navarra. The regulatory compliance offered by hotels, together with their professionalism and experience, are advantages to be taken into account for the sector. **The security and solvent experience offered by the Hotels are differential factors that the sector must promote** to influence the choice of guests over other agents of the collaborative economy.



OPPORTUNITY AREA 5

Technological transformation for the digital guest

The sharing economy is redefining the way the hospitality sector operates, so **technological transformation becomes crucial to adapt to the demands of a new type of digital traveler**. This includes moving forward in the digitization of services to deliver more personalized and engaging guest experiences, for example, through the use of

AI to generate personalized recommendations, virtual reality for immersive previews of accommodations or mobile applications to manage reservations and communicate with guests, as well as facilitate *check-in* and other digital services. According to [Euromonitor International's](#) barometer, 67% of consumers are expected to book online.

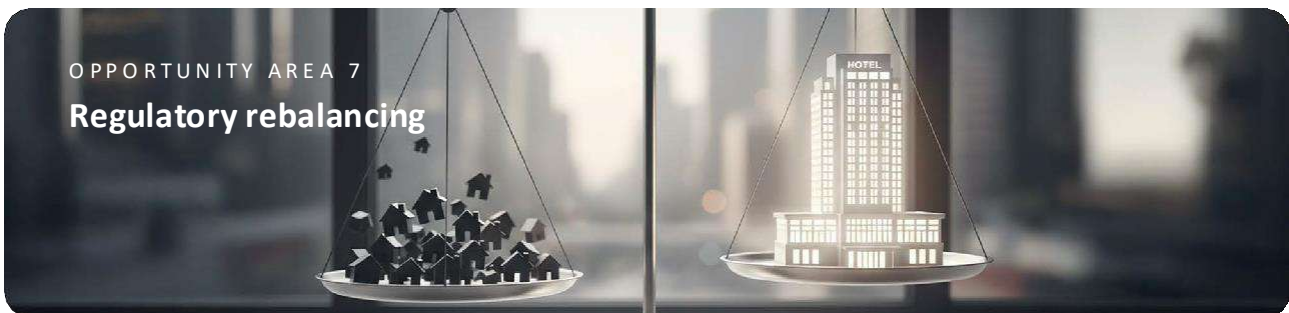


09 | COLLABORATIVE ECONOMY



Blockchain technology represents a significant opportunity for hospitality companies looking to adapt to the sharing economy and differentiate themselves in an increasingly competitive market. First, by providing a secure and transparent way to track transactions, the integration of hotel services with [blockchain](#) could **streamline many of the processes involved in booking, payment, and hotel stay**. It would also help [improve security, transparency and trust in the](#)

[transactions](#) and streamline the booking process. Second, integrating this technology enables areas of collaboration and, for example, **hotels can work together with each other to share relevant information securely**, as well as collaborate with suppliers to improve the traceability and quality of products. In addition, collaboration with travel agencies and booking platforms can streamline the booking and payment processes, improving the customer experience.



The [regulation of tourist](#) accommodation is reconfiguring the accommodation ecosystem in numerous destinations. This process opens up an opportunity for the tourism sector: to anticipate regulatory scenarios, order the offer and reinforce professional models aligned with urban and territorial sustainability.

A strategic reading of this evolution allows us to reduce uncertainty and consolidate a more stable competitive framework.

# Brands with a purpose



## Where do we start from? State of the art

Growing social and environmental awareness has transformed the way companies address their impact on society and the environment. As [sustainability and social responsibility](#) gain global relevance, brands are driven to embrace a purpose beyond profit maximization. This shift in business perception reflects the demand of modern consumers, especially younger ones, who value authenticity and seek out brands committed to ethical practices and social causes, as revealed by Amazon Ads' annual [Higher Impact](#) study. The report points out that **84% of global consumers are rethinking their needs to shop more sustainably and seven out of ten support brands that contribute money or material to causes important to them**; placing healthcare, health and well-being, the economy, the environment and poverty as central issues.

In response to this demand, the specialized consulting firm in sustainability Quiero, in its guide [From brands with a purpose](#) to impact brands, recognizes that companies have begun to apply changes to move in that direction, but warns that in many cases that purpose does not

It is activated in a clear and realistic way, falling into *greenwashing*, which has consequences on the brand and reputation. It recommends **defining an active, clear and tangible**, related purpose with a specific problem or cause and address it in a systemic way and with a regenerative vision.

According to [the World](#) Tourism Organization's [brand manual](#), in this sector, **the brand refers to the essence or set of basic characteristics of a product or destination, which encompasses its personality and makes it unique and distinct of the competition**. In the field of tourism, this

The evolution of brand purpose translates into a growing preference for destinations and services that integrate [sustainable practices and offer authentic and responsible experiences](#)

**One industry in which human branding is extremely important, although highly undervalued, is the tourism or hospitality industry**, according to the study [Human branding: from attachment strength to loyalty](#), since it is an industry highly influenced by personal interactions, which significantly influences [the tourist's experience](#). The analysis explains that, in the hotel sector, having a great human brand together with the offer of a great service becomes an important competitive advantage and, therefore, entails the possibility of developing a feeling of loyalty, attachment, kinship, and even a community of followers with consumers.

*One industry in which the human brand is extremely important, though vastly undervalued, is industry of tourism or hospitality*

by the consulting firm Edelman assesses the level of consumer trust and credibility in different types of organizations, and **ranks the hotel sector as the fifth most trusted by consumers**, with a significant increase in trust in the last year.



## Areas of opportunity for the hotel sector

The implementation of sustainable practices, corporate social responsibility initiatives and the alignment of values with guest expectations are key to stand out in a market where the most human brands are valued

and preferred by conscious consumers, [especially younger generations](#). Hotels can apply a few [key strategies](#) to boost their brand with purpose.

### OPPORTUNITY AREA 1

#### Trust, the most valuable asset of any brand



The [BrandSpark Most Trusted Awards 2024](#) analysis by the research firm BrandSpark International, concludes that trust plays a fundamental role in the decisions of consumers around the world. Increase the brand value and differentiate yourself from the competition

Through purpose is possible for the hotel sector, through building trust, making deeper and more authentic connections with consumers, according to the aforementioned Amazon Ads study.

### OPPORTUNITY AREA 2

#### Leaving the reception, Build alliances for change



Companies in the tourism sector can carry out unique initiatives to contribute directly society by raising its brand value, and [the hotel sector does so](#), for example, through the provision of meeting spaces for social causes or through free overnight stays for associations or contribution of funding or knowledge to specific causes, as [Exceltur explains](#). The employers' association assures that the future of the sector lies in strengthening its commitment to

workers, customers and [local](#) society by aligning their objectives with the [United Nations 2030 Agenda](#) and incorporating the social and environmental vision into their activity. To this end, Exceltur recommends betting on sectoral and intersectoral alliances, which help to combine objectives and manage actions of all actors related to tourism, whether public, private or social agents.



OPPORTUNITY AREA 3

**Less sustainable travel,  
More human sustainability**

While [sustainability](#) is a hot topic, consumers are faced with very different realities ranging from inflation to personal concerns, so the Accenture, in its report [The human paradox](#), recommends that tourism companies develop their strategies focused on the human factor, making sustainability easier to understand and apply, more identifiable and more human, to [improve the value proposition](#) and

Increase customer engagement. For example, hotels may offer bicycles or walking maps, develop locally sourced dining options, or invite guests to pick vegetables from the garden for dinner. Also it is possible to link the tourist stay with social involvement, such as Hilton [Hotels' initiative with Clean World](#) to collect used bars of soap, recycle them and distribute them among people from vulnerable groups.



OPPORTUNITY AREA 4

**Purpose as a framework of  
legitimacy**

In a context of growing social and territorial scrutiny, [the purpose evolves from an element of communication to a framework of legitimacy](#), also in the tourism sector. Articulate purposes that connect tourism activity with the positive impact that this activity generates in destinations

and local communities reinforces social acceptance of tourism and contributes to building long-term trust.

# Health and Mental health Wellness.



## Where do we start from? State of the art

Mental health has become a growing concern, affecting people of all ages and walks of life, to the point of becoming the main health problem, according to the [Global Health Service Monitoring](#) study by the research firm Ipsos. Stress, Anxiety and other mental disorders are becoming more common due to a variety of factors, including work pressures, economic challenges, political uncertainty, and lifestyle changes. The World Health Organization warns that more than 25% of the world's population reports [feelings of social isolation and loneliness](#) and predicts that **more than 900 million people around the world will experience a mental health disorder**, with depression and anxiety being the most common. The context is particularly difficult for young people and children, as the [European Commission](#) warns, and the [IV Youth Barometer 2025: Health and well-being](#) of the Mutua Madrileña Foundation and Fad Juventud.

**The World Health Organization warns that more than 25% of The world's population reports feelings of social isolation and loneliness**

In a global study conducted by travel agency [eDreams](#), **92% of the 10,000 respondents say that traveling has a very beneficial impact on their mental health.** The this figure is higher in Mediterranean countries and in Spain it amounts to 97% of respondents. Therefore, promoting destinations and tourism experiences that promote emotional well-being and offer support services can be a differentiating factor in choosing a destination. Research supports that rest linked to travel, and especially those linked to outdoor activities and in nature, are good for mental health, as explained by the study [Tourism as a Tool in Nature-Based Mental Health](#).

In the hotel industry, mental health care has become essential to providing a positive and satisfying experience to the guests. Hilton 's 2025 Travel Report shows that **50% of travelers are looking to travel to address physical or mental well-being**, for example, What hotels should not only care about offering quality amenities and services, but also about creating a welcoming and safe environment that promotes the emotional well-being of visitors. The quality of the environment, the level of service and the attention to detail can all play a role significantly in the perception of the guest and in their overall satisfaction during their stay.

**50% of travelers seek to travel to address physical or mental well-being**



## Areas of opportunity for the hotel sector

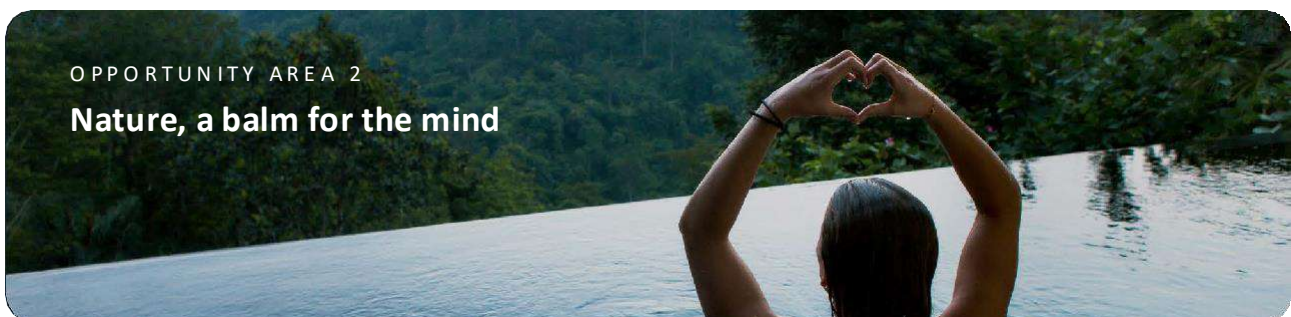
Wellness tourism is booming and the [Global Wellness Institute](#) expects it to grow by 21% to reach \$1.3 trillion by 2027. In Spain, Exceltur notes in its [Tourism Perspectives report](#), the consolidation of the

a trend of high prioritization of travel spending in the search for **greater physical and emotional well-being**, which opens up a range of opportunities for the hotel sector.



The hotel sector can capitalise on [the wellness tourism trend](#) by developing targeted offers that promote guests' [mental](#) health and well-being, as reported by [Hosteltur](#). This may include onboarding of spa services, relaxation activities such as [yoga and meditation](#), as well as the offer of

healthy eating options and exercise programs. In these environments, information can also be provided or **value added added through workshops or events** on how to manage stress, anxiety, and other related issues.



Hotels can take advantage of the [natural environment](#) to offer experiences that promote guests' mental well-being. This can include creating outdoor spaces such as gardens, walking paths, or contemplation areas, where guests can connect with nature and enjoy the mental health benefits it offers

contact with the natural environment. **In addition to the hotel's facilities, outdoor services** such as excursions, hiking trails, water activities or outdoor sports can be offered. A study in the journal [Nature](#) showed immediate benefits to the brain before and after taking an hour-long walk in a forest.



11 | HEALTH AND WELLNESS: MENTAL HEALTH



Creating [physical](#) environments that promote calm and well-being is crucial to meeting the [needs of travelers](#). Hotels can design their spaces to include green areas,

open spaces with natural light and rooms that incorporate design elements that encourage relaxation and rest.



The report [Outlook on the high-end market in Spain](#), carried out by McKinsey for Círculo Fortuny, certifies the upward trend in luxury tourism and emphasises haute cuisine, hospitality and well-being as its key levers. Hotels can offer [exclusive services](#) that go beyond the conventional, such as personalized spa treatments, holistic wellness therapies, and wellness programs.

*Expertly designed mindfulness* . In addition, personalized attention can be provided to each guest, ensuring that their needs emotional and mental care are attended to in an individualized manner and with a high level of quality. Not only does this create a memorable experience for guests, but it also positions the hotel as a luxury wellness destination that attracts guests looking for an exclusive experience.



11 | HEALTH AND WELLNESS: MENTAL HEALTH



Some [studies](#) support a worsening of mental health in the sector's [workforce](#) hotel, especially after the pandemic, in parallel with what happened with the general population. **It is important to foster an organizational culture of support and understanding in the workplace**, and there is also the option of implementing [comprehensive wellness programs](#)

[including](#) psychological support services, counseling, and resources to help employees manage stress, anxiety and other mental health problems. These programs may include meditation and relaxation sessions, group activities, and skills training.



The growing focus on mental health expands the traditional concept of [wellness in tourism](#). The industry has an opportunity to **embed emotional well-being into both the traveler experience and that of the employees themselves**

**of the sector**, responding to new social expectations and contributing to a more sustainable tourism activity from a human point of view.

# Social awareness: Diversity, Equity, and Inclusion



## Where do we start from? State of the art

Social awareness, understood as awareness and action regarding [diversity, equity and inclusion](#) (DE&I), has become a fundamental pillar in contemporary society. This movement embraces the notion that all people, regardless of their origin, gender, race, orientation, condition, or capacity, deserve equal opportunities and treatment. This trend is not only manifested in the everyday environment, but has also left a significant mark on the business environment, transcending beyond regulations and giving rise to new strategic elements of the culture of organizations, corporate purpose and competitiveness, as stated in the [the Adecco Foundation's 2024 Diversity, Equity and Inclusion Trends](#) report. In fact, **76% of companies in the world cite diversity and inclusion among their priorities**, according to the consulting firm [PwC](#).

In tourism, increased social awareness has influenced how travelers choose destinations and experiences that reflect inclusive values. **Modern tourists are looking for**

**destinations that [respect and value diversity](#) in all its forms.** This demand has led to the integration of social awareness not only in the choice of destinations, but also in the selection of accommodation and services. The sector takes this context into account and, according to the [first diversity](#) report by the World Travel & Tourism Council (WTTC), in some markets analysed, such as the United Kingdom or the United States, tourism employed more LGBTQ+ workers or people with some type of disability than the economy as a whole. The report points out that 60% of the companies analysed have staff dedicated to their inclusion and diversity policies.

In the hotel sector, **social awareness has triggered changes in the way establishments manage their staff, interact with local communities and adapt their facilities to be more inclusive.** Diversity becomes an asset, and [hotels](#) seek not only to attract a varied audience, but also to contribute to [a more equitable](#) and fair environment.

*In hospitality, social awareness has promoted logistical and talent changes to interact with local communities and be more inclusive*



## Areas of opportunity for the hotel sector

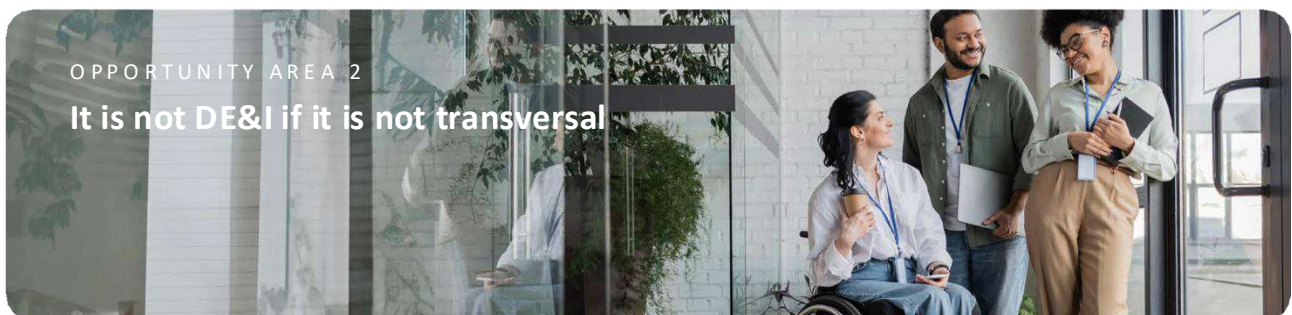
Research shows that more diverse companies are more successful at attracting and retaining talent and fostering innovation. But the success of an DE&I strategy is only achieved when

systems, managers and staff foster an inclusive and diverse environment without losing opportunities or talent, according to [the analysis of the consulting firm McKinsey](#).



Hoteliers that have all three key elements are best placed to respond to challenges, attract the best talent and respond to the needs of their wide variety of guests, as explained by the research [Diversity and inclusion in hospitality and tourism](#). Guests from all over the world come to a hotel with very varied backgrounds and cultures, so having a workforce that reflects this diversity guarantees a

deeper understanding of customer needs and better service delivery. Diverse teams bring a rich range of perspectives and ideas, fostering creativity and innovation, which are essential to continue being competitive. In addition, an inclusive workplace attracts top talent and also retains them, resulting in a more stable and engaged workforce.



The strategies implemented to achieve a standard of true diversity, equity and inclusion must cut across all areas of hotel activity: in staff selection, in professional promotion, in terms of training, work-life balance and co-responsibility. These

Strategies are not only a matter of the Human Resources department, but must permeate organizational culture and being present in internal communication and in all policies and procedures, especially promoted by management, as explained by the [Adecco Foundation](#).



It is important [to promote accessibility](#) at all stages of the journey, from transport to accommodation and tourist attractions, ensuring that all people, regardless of their physical or cognitive abilities, can fully enjoy themselves of tourist experiences without barriers or discrimination. For [hotels](#), it is possible **to turn accessibility into a competitive advantage by ensuring that all people, including those with physical or cognitive disabilities, can fully enjoy their stay.** This implies not only complying with accessibility standards in the

hotel facilities, such as ramps, elevators, and adapted rooms, but also offer additional services that enhance the experience for all guests, such as Braille information, menus in accessible formats, and personalized assistance for people in need special. By prioritizing accessibility at all stages of the journey, from booking to stay, the hotel company demonstrates its commitment to inclusion and diversity, while expanding its customer base and enhancing its reputation as a socially responsible brand that is aware of the needs of all its guests.



The purchase expense of a tourism entity (catering, outsourcing of services, maintenance, amenities, technology, works, logistics, MICE, etc.) can become a **direct driver of social and territorial inclusion.** Design a **procurement policy with a focus**

**inclusive** – [that prioritizes local and diverse suppliers, promotes employment of groups underrepresented and ensures fair conditions](#)—allows **the positive scope of a tourism entity's actions to be expanded** beyond internal operation.

# Talent Management in the face of new hybrid work models



## Where do we start from? State of the art

The growing adoption of [hybrid work](#) models, driven by [technological advancements](#) and changes in work dynamics, has redefined talent management in the business environment. This shift in the way of working, [boosted by the increase in teleworking due to the COVID-19 pandemic](#), has led to **greater flexibility in location and working hours**, challenging traditional employment structures. At the present time, compared to the 100% remote work of the months of the pandemic, data from the [National Institute of Statistics](#) (INE) support that companies are opting for a hybrid format to a greater extent.

Faced with this paradigm shift, organizations are forced to adapt to attract and retain talent, as well as to

Maximize employee productivity and engagement. A study by the [Social Observatory of the La Caixa Foundation](#) concludes that the reconciliation and improvement of personal and family life is one of the most important aspects of the work-life balance. one of the most valued elements in this new labor system where teleworking is gaining prominence. The [INE](#) survey reflects that

**Workers consider their experience with this modality to be very positive**, with an average of 8.6 points out of 10.

In the tourism sector, which encompasses a wide range of roles and functions, talent management is faced with the need to balance seasonal demand and fluctuations in demand with the growing preference for flexible working models. The sector employs 2.6 million workers, according to [the latest figures from the Ministry of Tourism](#), and, despite the recovery

of activity after the pandemic stoppage, in the last year it has also had to deal with staff [shortages](#). By 2026, studies suggest that Spain will exceed the record number of tourists international and expenditure reaching 91 million visitors and 125,000 million euros of spending. Its forecast is that **the sector will contribute 15% of GDP and 20% of the direct and indirect employment generated in the coming decades**.

The [figures](#) highlight the need to attract and retain the right talent for the hospitality industry. **Attracting and retaining skilled employees in an environment characterized by labor** mobility and changing expectations become crucial aspects for operational success and service quality. In hotels, talent management is also impacted by the need to adapt to more flexible and attractive work structures.

*Spain continues to exceed the record of international visitors year after year and the number of visitors, far exceeding the barrier of 90 million visitors and 125,000 million euros of expenditure*



## Areas of opportunity for the hotel sector

The implementation of remote collaboration technologies, professional development programs adapted to hybrid work and employee well-being strategies gain prominence when it comes to [maintaining committed teams and](#)

[efficient](#). Creating work environments that foster connectivity, work-life balance, and career growth are key to differentiating and strengthening employer branding in the hospitality industry.



In a competitive environment affected by talent shortages and turnover, [CEHAT](#) He assures that **benefits programs are essential for attracting and retaining talent in the hotel sector**, in addition to benefit the employer brand image. Within the benefit plans, the confederation highlights those that have to do with health and well-being (physical, emotional, and financial). On the other hand, in the face of the current economic uncertainty, hotel companies may not be able to

have as much room for manoeuvre to implement flexible remuneration strategies or increase spending on employee social benefits. Instead, the consulting firm [WTW](#) recommends increasing the possibilities of choice and flexibility (flexible shifts, rotation, rest days, day off on birthdays...) and expand work-life balance options. Another element that can help increase staff satisfaction is, for example, offering discounts on hotel services.



The transition of the hotel work environment does not only refer to the modalities of work, but hybridization also points to the employment itself; to all those **traditional jobs that will have to incorporate more technical and**

**Digitalisation of newly created functions or positions** linked to [new technologies](#). The article [Hybrid jobs of the future](#), by Hosteltur, emphasizes how the incorporation of advanced technologies and the automation of



13 | TALENT MANAGEMENT IN THE FACE OF NEW HYBRID WORK MODELS

repetitive tasks, derives in hybrid job profiles that combine technical and commercial skills. An example is the hotel reception, where the traditional receptionist evolves into a profile that includes skills techniques for managing automated systems and, at the same time, commercial capabilities

to make upselling sales and recommend products from the destination. On the other hand, the need for professionals specialized in the analysis of *big data* and the interpretation of biometric data requires the incorporation of new profiles and newly created positions.



Offering a stable and friendly work environment is necessary to retain talent and protect productivity. [CEHAT](#) recommends that hoteliers are committed to training and professional development in combination with work-life balance, to increase the feeling of belonging of the workforce and retain talent. This implies

Establish **career plans, mentoring strategies and training programs adapted to new hybrid work models**. In addition, the implementation of job rotation plans that take into account teleworking and flexibility will offer additional incentives to build employee loyalty.



The [transformation of job](#) expectations is forcing the tourism sector to rethink its employment models. This context opens up a strategic opportunity: to evolve towards work proposals that **integrate stability, professional development, well-being and social recognition**.

Reconfiguring tourism employment allows improving the attraction and retention of talent and raising the quality of service.

# Technological disruption: Hyperconnectivity



## Where do we start from? State of the art

Technology has infiltrated virtually every aspect of everyday life and the increasing [interconnectedness of devices](#) has generated a hyper-connected environment where [consumers are constantly online](#), accessing a wealth of information and services through their different devices. However, this **hyperconnectivity has also led to an increased awareness of**

### **The need to disconnect digitally**

and finding a healthy balance between the digital world and the real world. In fact, according to a study by the cybersecurity company [Kaspersky](#), **70% of the Spanish population is technologically dependent.**

In the tourism industry, [technological](#) disruption has transformed the way travelers plan, book, and experience their trips. From searching for destinations to booking accommodation and exploring local activities, travelers now rely heavily on technology to meet their needs and preferences.

**Google Travel data shows that 74% of tourists already plan their trips online.** The

proliferation of mobile apps, online booking platforms and virtual assistance services has made the travel process easier, but also it has generated a greater dependence on digital connectivity.

For hotels, this **hyperconnectivity presents both opportunities and challenges.**

On the one hand, hotels can take advantage of technology to offer more personalized experiences adapted to needs from contactless *check-in* and *check-out* to the personalization of services through mobile applications,

technology can improve customer satisfaction and operational efficiency, as analyzed in the study [Improving the service industry with hyper-connectivity](#). However, over-reliance on

technology can also alienate certain customer segments that are looking for a more authentic and [disconnected](#) experience. The study [Between escape and return: Rethinking daily life and travel in selective unplugging](#)

highlights that, in an increasingly digitized world, some travelers value the opportunity to disconnect, enjoy the present moment and reconnect with local nature and culture without digital distractions.

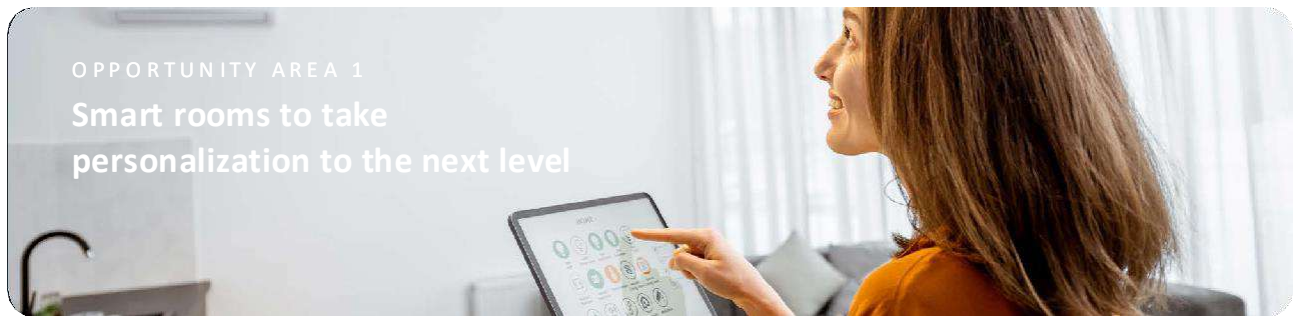
*Google Travel data shows that 74% of tourists already plan their trips by internet*



## Areas of opportunity for the hotel sector

Hoteliers are embracing technology in multiple aspects, from customer service to operational management, in the quest to improve their guest experience and be more efficient. The technological applications of the

**Smart** hotels include the use of artificial intelligence, data analytics, the Internet of Things and mobile apps, without losing sight of the necessary balance between the connected and real worlds.



### OPPORTUNITY AREA 1

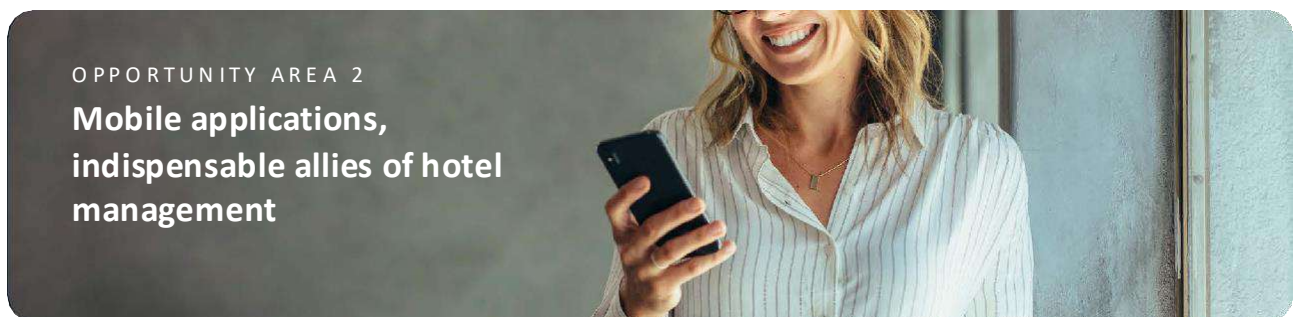
#### Smart rooms to take personalization to the next level

Travelers expect personalized experiences and greater interaction with their surroundings, even within their hotel room. [The Internet of Things](#) (IoT) offers

The ability to meet these expectations by allowing **guests to interact with all elements of their room intuitively** and conveniently. From adjusting lighting and temperature to controlling electronic devices, such as TVs and

Blinds, guests can customize their surroundings according to their preferences. In addition,

The implementation of electronic keys on customers' mobile devices facilitates check-in and check-out, guaranteeing greater security in access to the room. On the other hand, collecting **data through this technology helps hoteliers better understand guest behavior** and adapt their services and perform predictive maintenance, so that internal processes can be optimized and operational efficiency improved, according to [PwC](#).



### OPPORTUNITY AREA 2

#### Mobile applications, indispensable allies of hotel management

The growth of **mobile** apps in the B2B sector, i.e., in the business realm, continues to increase due to their convenience and ability to keep [businesses connected](#). More and more travelers are valuing these apps for their ability to reduce the cost of

stress associated with travel planning, and a significant portion would be willing to use apps that offer incentives. In fact, **76% of global tourists find that mobile apps reduce the stress of trip planning**, according to [Booking](#).



14 | TECHNOLOGICAL DISRUPTION: HYPERCONNECTIVITY

OPPORTUNITY AREA 3

**Virtual reality opens up a World of Possibilities**



Hotels are embracing virtual reality (VR) as an innovative way to enhance the guest experience. From **virtual tours of hotel facilities to immersive experiences showcasing local destinations**, VR is being used to offer guests [a](#)

[Detailed](#) and exciting insight into what to expect during your stay. This integration not only adds value to the customer experience, but also positions the hotel as a leader in technology and becomes an important [ally of the marketing strategy](#).

OPPORTUNITY AREA 4

**Digital disconnection arrives on the menu of hotels**



It's important to find the right balance between the convenience of technology and the authentic experience that hotels offer. To meet the demand of customers looking to disconnect, **experiences that promote digital disconnection can be created, such as wellness retreats, outdoor activities, and technology-free spaces**. Offline time

digital is usually considered as a more real experience, as time for oneself or quality time, according to the study [Creating opportunities for temporary disconnection: How tourism professionals provide alternatives to being permanently online](#), which is committed to nature and cultural activities as a counterpoint to hyperconnectivity.

OPPORTUNITY AREA 5

**Hyperconnectivity Management**



Hyperconnectivity redefines the traveler's relationship with destinations and services, but **it also generates digital saturation**. Managing this environment consciously, [balancing technology and human presence](#), allows us to **improve the quality of the experience** and differentiate the

tourism proposal in highly digitized environments.

# Customer Experience and hyper-personalization



## Where do we start from? State of the art

The pace of technological change has completely redefined consumer expectations, a transition driven by widespread access to technology, which has made it possible to collect and analyze data more effectively, giving companies the ability to understand the specific needs and wants of each customer, in the words of the consulting firm [McKinsey](#). In the same sense, the article [Forbes Business Council's Why Traditional Customer Service Is Over And Hospitality Is The Future](#) argues that, in a world where artificial intelligence (AI) can respond to queries instantly 24 hours a day, **the Personalization is consolidated as the key to the future of customer experience.**

By prioritizing personalized customer experience, businesses can increase retention and loyalty, expand their market share, and ultimately their profits. In another analysis,

[McKinsey](#) explains that, in general, successful experience-based growth strategies can increase cross-sell rates by 15% to 25% and **improve customer satisfaction and engagement by 20% to 30%.**

The traditional approach to offering standard tourism services has evolved towards a highly personalised customer experience. There is a paradigm shift in the perception of tourism and hotel services, where guests are not only looking for a place to stay, but a unique experience that suits their individual preferences. The study Experience is everything by the consulting firm PwC, says that the hotel sector is one of the branches of tourism where experiences have the greatest influence on customers' purchasing decisions, as well as other magnitudes such as price or quality of service.

*The hotel sector is one of the branches of tourism where experiences have the greatest influence on customers' purchasing decisions*



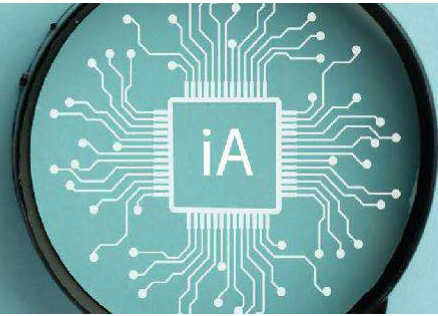
## Areas of opportunity for the hotel sector

There is no single strategy to achieve success through hyper-personalization and create a memorable customer experience. Every guest has needs and tastes

individuals, so it is necessary to have the right tools to generate solutions adapted to any solution and consumer:

### OPPORTUNITY AREA 1

#### Artificial intelligence, a strategic tool to anticipate consumption patterns



AI applications can interpret complex data and behavior patterns, learn from them, and predict customer needs.

These tools can help hotels identify **demand patterns**, anticipate and meet these needs with a greater degree of personalization and make a more efficient allocation of resources, as explained by [the World Travel & Tourism Council](#) (WTTC). Analyzing behavior and consumption patterns, **pricing strategies can be adapted**

**and loyalty programs** according to personal preferences. AI can also be an ally to create services according to the customer's previous experiences and, of course, an essential tool to automate tasks, such as meal reservations, flight changes or service purchases. For the WTTC, [AI has evolved from an opportunity](#) to a strategically vital business tool for creating more sustainable, personalized, and meaningful travel experiences.

### OPPORTUNITY AREA 2

#### Big data to anticipate Guest preferences



Personalizing guest experiences means for hotels to collect and analyze large volumes of **data** about their preferences and behaviors. Big **data** helps **revenue management**, **rate optimization**, and **profits by analyzing data** such as occupancy rates, current bookings, and external events. It also allows you to identify

preferences and trends in the services and activities associated with the sector. On the other hand, it helps to identify and **analyze data to apply in segmented targeted marketing strategies and optimize online advertising campaigns**, in addition to analyzing comments and reviews on social networks to better adapt its services.



*Big data helps with revenue management, rate optimization, and profits by analyzing data such as occupancy rates, current bookings, and external events*

OPPORTUNITY AREA 3

**Customer Relationship Manager (CRM) systems and multichannel services for a 5-star experience**



The integration of these two elements allows customer information to be managed in a comprehensive way, ensuring consistent and personalized communication across various channels, which will result in a better experience and a more personalized hotel experience, according to [Salesforce](#). The CRM acts as a centralized repository of customer data, from booking histories to individual preferences. By leveraging stored information, hotels can anticipate guest needs and offer highly personalized services. For example, a hotel can use CRM to remember a customer's food preferences and offer tailored dining options during their stay. For its part, the implementation of multichannel services makes it possible

Interact with the hotel through their preferred channels, whether from the mobile app, website, social media, a chat, or phone support. Not only does this provide convenience to the customer, but it also **gives the hotel the opportunity to collect additional data about their preferences and behaviors** in different contexts. The combination of CRM and [multi-channel](#) services facilitates seamless, personalized communication at all stages of the customer journey, from planning to *check-out*. For example, the hotel can send personalized offers through the mobile app, providing booking updates via text message and collecting feedback and reviews through social media platforms, all managed efficiently through the CRM.

OPPORTUNITY AREA 4

**Tailoring the service and engaging the conscious traveller**



The hotel sector must bet on sustainability strategies, since guests, increasingly

more, [they seek to stay in places that respect the environment](#) and are more demanding about the



materials with which hotels are built, the way food is processed and served, recycling, energy efficiency, water management, etc. Guests themselves are also already implementing measures to increase the sustainability of

according to a [Booking report](#), 74% of customers turn off the air conditioning in the accommodation when they are not in the room, 66% reuse the same towel several times and 57% use their own reusable water bottle.



The proportion of people aged 65 and over is increasing at a much faster rate than other age groups, so it is expected that by 2050 16% of the world's population will be over 65 years of age, according to projections by the [United Nations United](#). The ageing of the population opens up a long-term market niche for the hotel sector, linked to the so-called [silver economy](#) or silver economy. This age group is generally characterized by having [a higher income and spending capacity](#). In addition, their preference for tourism is confirmed; seven out of ten have gone on holiday in the last year and 76% plan to travel this year, especially within Spain, according to the [IV Barometer of the senior consumer](#). The report states that **hotels are the most common type of accommodation for them**

(54%) on their journeys. Tourism destinations should seize the opportunity by tailoring their offerings to meet the needs and preferences of this segment of the population, from travel programs designed specifically for seniors to creating friendly and accessible infrastructure for seniors. The latest edition of the biannual report of the [National Observatory of Outbound Tourism \(ObservaTUR\)](#), predicts an **evolution of the senior market above other segments**, taking into account the size and capacity of the target market, with a customer that is the driving force of demand and has a high capacity for influence. This trend not only presents economic opportunities for hotels, but also promotes inclusion and diversity in the sector.



**Hyper-personalization** is evolving towards models that prioritize utility and real value for the traveler over the intensive use of data. The tourism sector has the **opportunity to offer [personalized experiences that respect the](#)**

**[context, privacy, and customer expectations](#)**. When personalization is perceived as a service that simplifies decisions and improves the experience, it is consolidated as a key factor of loyalty and sustainable differentiation.

# New models Tourism



## Where do we start from? State of the art

Changes in consumer habits, new sustainability standards and the search for different experiences are marking the evolution of the global economy. Companies are looking to adapt to **consumers who prioritize their well-being and expect that brands personalize their goods and services** based on their tastes and mood, according to Euromonitor International. In its [Global Consumer Trends 2024 report](#), it explains that consumers want to stop thinking about what stresses them out on a daily basis and that, with their purchases, they seek to relieve their anxieties and break away from the mundane.

The research organization [The Conference Board](#) explains that consumer psychology has changed since the pandemic and, in plain sight, of wars and geopolitical tensions, their behavior is marked by uncertainty and they tend to "**live today and spend today**", a trend especially true in the younger generation.

The tourism sector is no stranger to this search for moments evocative of positive feelings with the premise of leaving worries behind, even if it is for a few days. When it comes to

In order to respond to this strategic trend, the complexity of what KPMG calls a [generational paradigm shift is added](#): the traditional model in which tourists booked packages in their countries of origin is added to the

the new profiles that demand a differentiated offer of products and services. They are looking for unique experiences, tailored to their individual tastes and preferences, rather than following the standard itineraries offered by conventional packages. This leads to **several models coexisting at the same time and to which each destination and element of the tourism value chain must adapt**, to attract its potential customers.

Specialization to learn about different identities, cultures and preferences will be the key for the hotel companies to learn about the different identities, cultures and preferences.

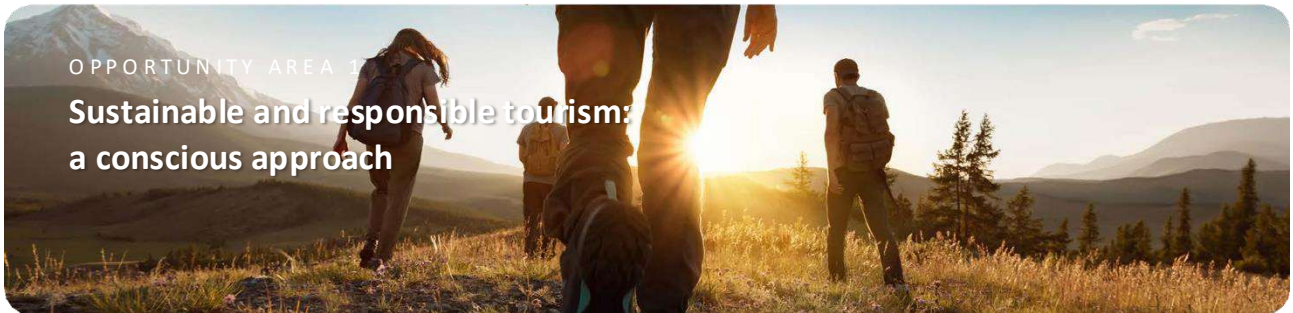
can respond correctly to this demand, according to the consultancy.



## Areas of opportunity for the hotel sector

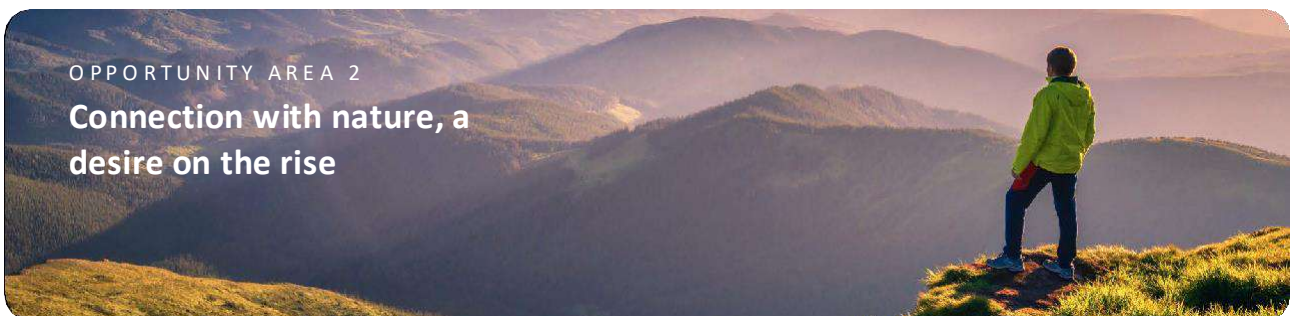
The tourism industry is undergoing a significant transformation driven by various factors that have redefined traveler preferences and the way hospitality businesses

operate, with the emergence of new models of tourism adapted and embracing more diverse and personalized concepts.



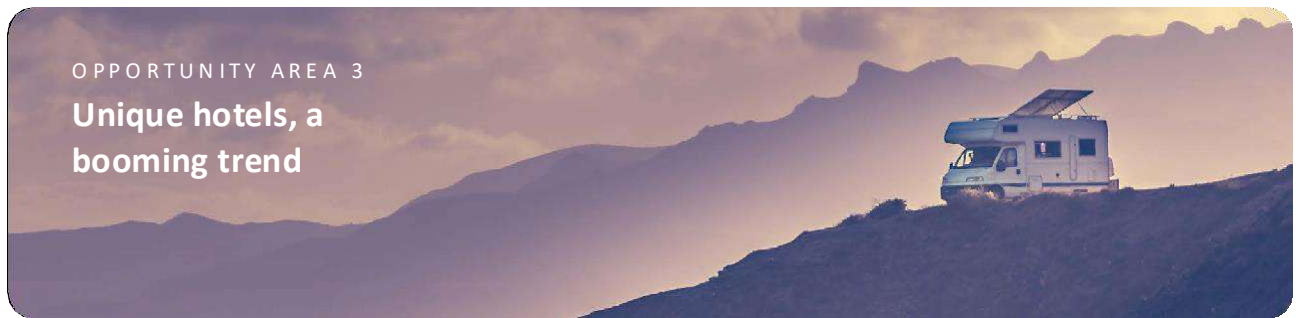
This new trend in the tourism sector encompasses [sustainability and responsibility](#) from three axes: the environment, the economy and society, with the aim of reducing the negative impact and **promoting cultural conservation and local traditions**. It also seeks to promote the local economic development through **purchases from local producers and service providers, generating employment** and improving the [quality of](#)

[life of the receiving community](#). Hotels can support the local economy by purchasing products and services from local suppliers and hiring community professionals for their services, and promote cultural preservation by offering experiences that allow guests to learn about and appreciate the traditions and customs of the region, as well as promote cultural preservation.



In the search for greater well-being, more and more tourists (68%) are looking to surround themselves with nature to gain mental health, according to the American [Express Travel Global Trends](#) Report. **Nature tourism includes a wide range of outdoor experiences**, such as adventure trips, hiking, or wildlife viewing trips. It is one of the types of tourism that [registers the greatest growth](#) and there are studies

which guarantee its compatibility with a [positive economic impact](#). Within the context of regenerative tourism, [some destinations](#) are already promoting alternative business models, which favour coexistence with the local, are committed to sustainable transport such as bicycles or hiking and create unique experiences where nature, agriculture and community customs are mixed.



OPPORTUNITY AREA 3

**Unique hotels, a booming trend**

Cabins, caravans, teepees, lighthouses or accommodations adapted to the natural environment are gaining popularity in the tourist market. With the aim of specializing and differentiating themselves from the competition, more and more hotel openings are taking place

unique, demonstrating the growth potential of this segment, according to [Hosteltur](#). It is also a response to the growing trend for [destinations adapted to the natural environment](#) and consumer preferences.



OPPORTUNITY AREA 4

**Global demand cruise ship prices continue to rise**

After growing by 14% in 2023, 36 million passengers are expected worldwide in 2024, according to a report by the [Cruise Lines International Association](#). Hotels are no strangers to this trend and the combination of their services together with the offer of cruises is gaining prominence, as shown by their inclusion in

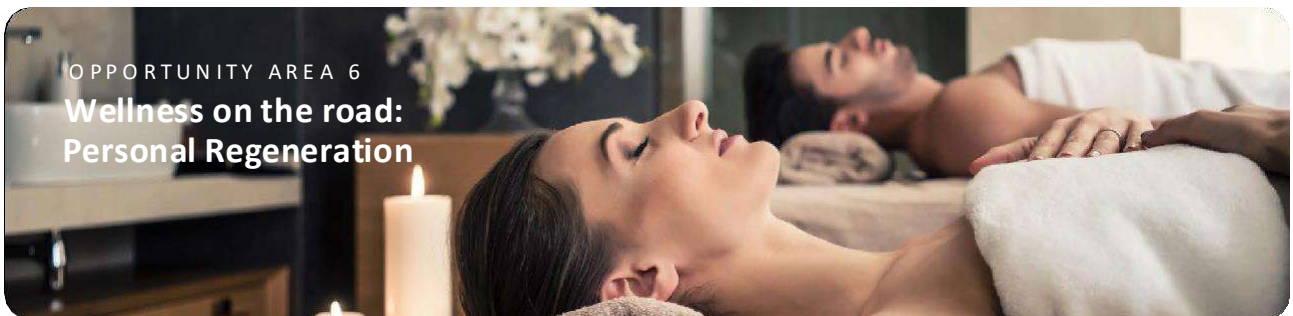
the reference publication [Forbes Travel Guide](#) since 2023 or the entry into the sector of two giants such as [Four Seasons](#) or [The Ritz-Carlton](#). The figures for Spain also support the margin for growth, with a record of 12 million cruise passengers last year, according to [Hosteltur](#) and Puertos del Estado.



[Booking](#) assures that more than 40% of tourists, if they can afford it, prefer to travel outside the high season. It is an upward trend, but the data from the [Tourist Expenditure Survey](#) reflect that the summer season undoubtedly remains at the forefront in spending and number of bookings, especially in beach destinations, such as the Balearic Islands. **Offer alternatives and diversify Supply** is at the heart of deseasonalisation strategies. Other destinations, such as

Madrid, maintain the levels of visits throughout the year thanks to the leisure and culture offer, according to the marketing firm [Braintrust](#).

*More than 40% of tourists prefer to travel outside the high season, if they are can allow*



Hilton's [trend report](#) ensures that the search for rest will be one of the priorities when choosing the destination and accommodation, a desire that is common to all generations of travelers (generation Z, *millennials*, generation X and *baby boomers*). Hotels are looking for new ways to ensure comfort and noise reduction to promote that rest and can take advantage of

the habits of the new generations, such as listening to a podcast or regulating exercise before sleeping, to adapt their services and products in the rooms. Relaxation and wellness services are a growing trend, and **in Europe this market niche is developing**, being [the main region of](#) origin for wellness tourists.

*Relaxation and wellness services are on the rise, and Europe is the main source region of this type of tourism*



OPPORTUNITY AREA 7

**Discover exclusivity: luxury, gastronomic, health and solitaire tourism on the rise**

In line with the search for greater personal care, other emerging tourism models are observed, such as [luxury](#), which offers exclusive experiences and a high level of service; [health tourism](#), focused on activities and services that promote physical and mental well-being; [tourism](#)

[gastronomic](#), which seeks to explore the local culinary culture and enjoy unique culinary experiences; and solo tourism, aimed at those who prefer to travel alone to experience a deeper connection with themselves and their environment.



OPPORTUNITY AREA 8

**Immerse yourself, explore, and experience the culture**

Four out of ten tourists choose their destination based on its [cultural offerings](#), according to the [European Commission](#), and nearly two-thirds of travelers say they often or always book their hotel based on **access to local experiences**, according to Hilton. Offer room packages with tickets to a show, event

A sports car or a concert can be a good way to adapt to this trend. [Expedia](#) data shows that 70% of travelers are more likely than ever to travel outside of their city to go to a concert and that 40% would use a concert as an excuse to visit a new place.

# Conclusions

Sustainability has become an imperative for the hotel industry, not only because of growing regulatory pressure, but also because of consumer demand and the need to efficiently manage resources. **Energy optimisation is a strategy effective** to improve hotel efficiency, from the design of facilities and the use of renewable sources to the implementation of responsible practices in daily activity. These measures involve simple changes, such as replacing lighting and strategies to reduce resource or food waste, and more comprehensive solutions, such as waste management and circular economy programs. Training staff on sustainable practices is also crucial to lead to more efficient operations and promote responsible behavior among guests.

Added to this is the need for hotels to move towards "climate adaptive" tourism models, capable of responding to extreme heat waves and disruptive weather events through thermal comfort, risk communication and operational resilience solutions. This climate adaptation is consolidated as a structural component of sustainability, by guaranteeing safety, well-being and continuity of service in more demanding environmental scenarios.

**Regenerative sustainability offers an opportunity to revitalize destinations and communities** while minimizing environmental impact. Effective collaboration along the entire hotel value chain and participation in local development initiatives are key to moving in this direction. Redirecting services towards products that promote well-being and the relationship with the natural environment, such as ecosystem recovery tourism, not only responds to the demand for authentic experiences from travelers, but also contributes to the conservation of the environment. The commitment to sustainability also helps to **capitalize the rise of wellness tourism**, for which it is essential to incorporate comprehensive programs that address both **the physical and emotional needs of guests**, with initiatives such as mindfulness programs or activities in nature that promote connection and mutual care.

While over-regulation is a challenge in terms of regulatory compliance and operational costs, it is also an opportunity for hotel companies to adapt and meet stricter standards in areas such as energy efficiency, waste management and emissions reduction. Hotels that manage to navigate this complex regulatory environment will increase their business value and brand reputation.



Both on the operational side of hotels and in customer service, innovation has become a necessary constant in the sector. Innovation in all areas of companies **boosts competitiveness and profitability** and in the case of the hotel sector, it also serves to anticipate the needs of the hotel sector. of customers. In this sense, it plays **a crucial role in improving the traveler experience** and the competitiveness of destinations. That is why it is necessary to have innovation teams, capable of implementing solutions and new products and services and anticipating market changes.

Technology also plays a crucial role in improving the customer experience and operational efficiency in hotels. The implementation of the Internet of **Things and mobile apps** allow guests to personalize their experience and facilitate access to services. Virtual reality can be used to offer a detailed view of the facilities and local destinations, adding value to the tourist and positioning the hotel as a leader in innovation.

The incorporation of advanced artificial intelligence systems and the reinforcement of cybersecurity are gaining importance growing in the modernization of the sector. **AI makes it possible to optimize internal processes, improve decision-making, and raise the level of personalization in all phases of the customer**, from pre-booking recommendation to in-stay interaction. In turn, **cybersecurity is consolidated as an essential element to protect sensitive information, guarantee operational continuity** and strengthen trust in an increasingly digitized environment.



The combination of both dimensions drives innovation that is safer, more efficient, and aligned with the expectations of guests and the teams themselves.

However, **it's important to balance the convenience of technology with the authenticity of the hotel experience.**

Some travelers are looking to disconnect and enjoy more genuine experiences and hotels can meet this demand by offering packages and activities that promote digital disconnection, such as wellness retreats and technology-free spaces, so guests can immerse themselves in the present and fully enjoy their experience.

Likewise, the rise of the collaborative economy has driven adaptation dynamics in the sector, which seeks to add attributes and experiences similar to those of shared housing for compete effectively and increase synergies with local actors.

In addition, talent management is presented as a decisive aspect for companies. Hospitality companies, which must **attract and retain skilled employees in an environment of labor mobility and changing expectations.** The implementation of remote collaboration, professional development programs adapted to work hybrid and employee care strategies are **opportunities to strengthen the employer brand and differentiate yourself in the market.** The promotion of diversity, equity and inclusion, as well as a commitment to social responsibility, are vital elements to attract and retain talent, as well as to strengthen reputation of the brand and generate a positive impact on society. In a conscious and demanding market, **hospitality companies that integrate talent management, social awareness, and a purposeful brand into their business strategy are better positioned** to compete in the market and generate a positive impact in the long term.

The adoption of sustainable practices, the integration of cutting-edge technology and the focus on customer experience shape a new paradigm in the hotel sector. These transformations not only represent a change, but an opportunity for hotels to become exciting destinations by taking the hotel experience to a whole new level.



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