



# Hotels sector overview

From rooms to experiences — building  
ecosystems of personalized loyalty



The hotel sector is undergoing a profound transformation. Where once the business revolved around providing a room and bed for the night, today's competitive battleground is the experience economy. Guests now expect more than a comfortable stay, they want curated, memorable moments, supported by loyalty ecosystems that extend far beyond the hotel walls.

### From loyalty points to lifestyle ecosystems

The world's largest hotel groups, Marriott, Hilton, IHG, Accor, are reshaping their loyalty programs into ecosystems of experiences. With tens of millions of members (IHG Rewards counts around 100 million),<sup>1</sup> these programs are no longer about redeeming points for a free night. Instead, points can be used for once-in-a-lifetime moments: Hilton members can attend exclusive concerts with ambassadors like RAYE, Accor partners with Paris Saint Germain to offer sports experiences, while Marriott Bonvoy members gain access to cultural and culinary events.

These partnerships transform loyalty into lifestyle, embedding hotels into the broader rhythm of travel, entertainment, and leisure. Crucially, they also give hotel brands direct ownership of the customer relationship, reducing dependency on online travel agencies and regaining control of data, margin, and personalization.

### Competing in the experience economy

The sector is also responding to a wider social shift: consumers are spending more on activities and experiences than on products or passive leisure. Venues like Gravity in London, repurposing former department stores into hubs for go-karting, darts, golf, and dining, illustrate how leisure is being redefined. Health and wellness trends, changing drinking habits among younger generations, and the desire for mixed-group, social activities are accelerating this evolution.

Hotels, with their venues, locations, and service infrastructure, are uniquely placed to capitalize on this shift. By reimagining underused spaces such as lobbies or restaurants as community hubs, partnering with local florists, coffee shops, and artisans — they can blur the lines between hotel, cultural venue, and social destination.

### Personalization as the new loyalty

At the heart of this change lies personalized loyalty. Whether at the mass-market level or in ultra-luxury properties, the expectation is for hotels to recognize not just who a guest is, but why they are there. The mission of the trip, a midweek business stay, a family weekend, or blended "bleisure" travel, demands entirely different experiences.

Technology plays a growing role in enabling this: mobile check-in, digital room keys, IoT-enabled rooms, and in-room AI assistants are becoming standard. But the true differentiator remains the ability to blend digital personalization with emotional intelligence. Luxury brands like the Ritz-Carlton lead here, combining advanced CRM systems with staff training that ensures guests feel personally known, the hotel equivalent of a local pub landlord pouring your drink before you ask.

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The hotel sector is shifting from merely providing rooms to orchestrating personalized experiences and loyalty ecosystems. Success in this evolving landscape hinges on three interconnected priorities: continuous experience innovation, strategic ecosystem expansion, and delivering personalized loyalty through a blend of data and emotional intelligence. Hotels that master these dimensions will undoubtedly define the future of hospitality. ”

#### Will Hawkley

Global Head of  
Leisure and Hospitality  
KPMG in the UK

<sup>1</sup> IHG Hotels & Resorts. "Powerful Loyalty Programme." IHG Development: Owner Value

## Expanding through partnerships

Ecosystem thinking is also shaping portfolio strategy. Asset-light models dominate, with hotel groups expanding through partnerships and sub-brands that cater to new customer segments and use cases — from extended stay suites to luxury lifestyle hotels. Collaborations with brands like Bulgari and Nobu, allow groups to broaden their reach while maintaining brand relevance in a crowded market.

## Hospitality's next chapter

The hotel sector is no longer about selling rooms; it is about orchestrating experiences and ecosystems. Success depends on three interconnected priorities:

- Experience innovation: continually creating new ways for guests to live, play, and connect.
- Ecosystem expansion: building loyalty platforms that span travel, entertainment, wellness, and community.
- Personalized loyalty: using data and emotional intelligence to deliver experiences that feel uniquely crafted for each guest.

As travelers increasingly value memories over material, hotels that master these dimensions will define the future of hospitality.

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Designed by Evalueserve.

Publication name: Hotels sector overview: From rooms to experiences — building ecosystems of personalized loyalty | Publication number: 140331D-G | Publication date: January 2026