

NEW CODES OF LUXURY

ELEVATING THE HOSPITALITY GUEST EXPERIENCE *with AI*



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Together Group is a curated collective of creative consultancies, technology and production studios crafting the future of luxury and lifestyle.

We blend creativity, culture and cutting-edge immersive technologies to create and elevate brands, experiences and destinations of the future.

As of today, the group integrates the capabilities of 14 category-leading specialist houses, with over 700 people collaborating across 20 locations globally.

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Foreword



*H.E. Ahmed Al-Khateeb
Minister of Tourism and
Chairman of TOURISE*

Today, experience is the new currency of luxury, defined by moments that transform and endure. As we invest in delivering seamless journeys and meaningful personalisation, AI emerges as a powerful enabler. Guided by human insight, destinations and brands are re-imagining value through meaning, emotion and connection to deliver excellence at every touchpoint.

This report presents a compelling vision for how AI can elevate luxury hospitality while preserving the essential human touch, reflecting TOURISE's belief that innovation must always serve people. I invite you to explore its findings and consider how technology can help shape the future of hospitality with purpose and creativity.

AI in Saudi Arabia : Powering Vision 2030 and the Future of Hospitality

As a cornerstone of Saudi Arabia's Vision 2030, artificial intelligence is being deployed not as a tool of automation, but as a catalyst for hospitality excellence. Across the Kingdom, AI is woven into experiences that anticipate travellers' needs, adapt in real time and preserve the warmth of human connection.

From Qiddiya's immersive worlds to AIUla's living heritage, Diriyah's cultural legacy and the regenerative beauty of The Red Sea, more than 100 destinations are serving as testbeds

for a new kind of hospitality – one where technology learns from people, not the other way around.

AI is redefining personalised journeys, intuitive service and seamless storytelling that blend innovation with identity. This approach reflects a global trend: AI in tourism is projected to grow from £2.55bn (\$3.37bn) in 2024 to £10.52bn (\$13.86bn) by 2030, underlining the scale of transformation under way.

Saudi Arabia is not just building destinations – it is shaping the future of how the world feels welcome, in line with Vision 2030's ambition to position the Kingdom as a global tourism leader.

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Amangiri by Visualisation One

Executive Summary

AI offers brands a way to close luxury hospitality’s innovation gap and redefine what service excellence means. In this context, the future role of artificial intelligence (AI) will be to connect data, context and decision-making – and give staff the real-time insight needed to truly take the guest experience to the next level. This report maps the consumer shifts, innovation frontiers and practical paths forward for luxury brands in this space.

: New Luxury Mindsets:

The expectations of luxury travellers are changing. Guests are looking for seamless, meaningful interactions, where recognition, ease and confidence in their choices are central to value – and experience outweighs all. These priorities set the stage for AI to drive innovation and boost guest satisfaction.

: Future AI Frontiers

Four innovation frontiers are defining how AI can transform the guest experience: Curated Discovery, Seamless Journeys, Personalisation at Scale and Augmented Hospitality. These show how and where AI can remove friction to make stays feel seamless, and drive service that feels personal and always distinctly on-brand.

: Hospitality’s Digital Transformation

The sector is entering a new phase of operational re-invention. Challenger brands can build AI-first systems from the ground up, while legacy players can connect and scale what they already have. Transformation will not look the same for all brands, and it will require a crawl-walk-run mindset.



Key Findings:

: AI is part of luxury’s near future

Our latest Future:Poll™ data shows that, among luxury travellers from the UK and the US, 88% say AI-enabled services will be important to luxury hotels within five years, and 39% call them essential.

: Technology and service are both top priorities

Some 60% of luxury guests now consider both exceptional service and innovative technology among their top booking priorities, according to our Future:Poll™ findings. The ability to connect these – so technology is part of the service promise – will define what comes next.

: Visibility of technology in luxury hotels needs calibrating

Guests are shown to hold two simultaneous preferences, with 70% wanting technology to be highly visible as a sign of innovation, and 42% saying the best use of AI is when it’s invisible in the background (Future:Poll™). Brands must manage this tension.

: Personalisation carries a premium

Some 47% of respondents say they would pay 5–10% more for a highly personalised stay, and 62% are very comfortable with hotels using AI to make tailored recommendations (Future:Poll™). Being able to scale personalisation will help even mid-tier brands raise the bar.

: Privacy is a key trust marker

With 55% citing data protection as their top concern and 41% deterred by identifiable data-sharing (Future:Poll™), transparency and consent will become differentiators. The future will be privacy-safe, self-hosted models that give guests visible control over their information.

: Human-first service remains non-negotiable

Some 63% of guests say service should stay ‘human-first’, while 46% would value AI if it gave staff more time to spend with them (Future:Poll™). AI should empower staff, not replace them – offering real-time data and context to deliver more personalised service.

: Transformation will be phased

AI transformation will not happen overnight, but in deliberate, strategic stages. Dave Benton, founder of Metajive, explains: ‘AI should be thought of as a multi-year roll-out.’ Successful brands will treat it as an evolving capability, test small pilots and scale what most enhances the guest experience.

Future:Poll™ is The Future Laboratory’s quantitative division. For this report, primary research was conducted online from 2 to 12 September 2025 among 2,000 adults in the UK and the US who had spent at least £500+ (\$650+) per night on a hotel stay within the past 12 months.

INTRODUCTION

Luxury hospitality is at a turning point. As AI starts to level the competitive landscape, both legacy and challenger brands have an opportunity to close the sector's innovation gap and redefine what service excellence means for the next generation of travellers.

For decades, luxury hospitality has relied on a familiar formula: high-touch service, iconic destinations and the promise of exclusivity. Established brands built lasting reputations on these qualities, while newer players have worked to find distinctive ways to compete in a market shaped by tradition.

Today that balance is shifting. Competition is intensifying as legacy players expand and diversify, and new entrants target tomorrow's travellers. But guest expectations are in flux too, with travellers questioning value for money, and whether the many promises of luxury hospitality are truly being delivered.

At the same time, artificial intelligence (AI) is emerging in an industry that has, by its own organic success, innovated relatively little. Fragmented systems and the struggle to own the end-to-end guest experience mean the sector is primed for disruption – yet luxury and ultra-luxury hotel brands remain cautious about AI.

'There's been relatively little genuine innovation in the luxury and ultra-luxury hospitality sector – probably for decades,' says Georgia Fendley, founder and creative director of Construct London, which specialises in

brand creation, design, strategy and communications for luxury brands. 'I'm not negative about what exists now, but I think the sector is ripe for change.'

'Now is the time when this industry that has primarily invested in properties and people in the past needs to equally prioritise investments in innovative technologies,' echoes Dr Christian Kurtzke, CEO of Together Group. 'The future luxury value proposition is no longer only about the place, but increasingly about each individual guest with their needs, desires and aspirations.'

Kurtzke adds: 'Brands that wait until the arrival of their guests to discover their interests will miss critical opportunities for service excellence. And brands that operate across multiple locations and collections in particular won't succeed in offering the necessary consistency of service, personalisation and quality at scale to sustain the luxury premium in an age of tech-savvy, global nomads.'

The implications could take service to another level. For challengers, AI could quickly lower barriers to entry: dynamic guest profiles, intelligent concierge systems and seamless booking flows could –

if properly executed – leap-frog decades of outdated infrastructure. For incumbents, the challenge is greater still: reputations built on service must now be translated into data-rich, AI-enabled systems that feel as personal and distinctive as the brand itself.

Luxury travellers are signalling an appetite for this shift. In our Future:Poll™ survey of 2,000 luxury hotel guests in the UK and the US, nearly nine in 10 (88%) say AI-enabled services will be important to luxury hotels within the next five years, with 39% calling them essential. Meanwhile, 60% cite both exceptional service and innovative technology as top priorities when booking a hotel.

But adoption cannot mean innovation for its own sake, and it cannot take a one-size-fits-all approach. If every brand deploys the same off-the-shelf tools, differentiation will be lost. Instead, the winners will be those who not only use AI to radically enhance service design, but also train AI on their brand fundamentals, codifying brand tone, culture and creativity into the future guest journey. Technology – and AI in particular – must be approached with the same intentionality once reserved for design, cuisine and location.

In this sense, AI is not an optional upgrade, but a critical aspect of future advantage. The question then becomes: who will use AI not just to modernise operations, but also to re-imagine technology's place in a luxury context?

This report details AI's emerging role in hospitality, with the potential to power data, context and decision-making – and make guest interactions feel as if a dedicated team is anticipating their needs. Practically, that means ultimately enabling a far more proactive and anticipatory style of service at scale.

While this research focuses primarily on luxury hospitality, many of the findings hold relevance for the wider luxury sector – from fashion and beauty to property, automotive and beyond – offering lessons for elevating service and experiences.

In the sections that follow, we explore how that transformation is starting to unfold. Part One identifies the consumer shifts redefining what tomorrow's guests will expect from luxury. Part Two maps four AI frontiers where brands can embrace this future. They point to a clear conclusion: the new age of luxury hospitality is here, and brands must choose whether to lead it – or risk being left behind.



AI imagery by The Future Laboratory

Part one

NEW LUXURY MINDSETS

Luxury hospitality has always strived to meet its guests' high expectations. But what today's luxury travellers want – and what they are willing to pay for – is evolving at a pace many brands are struggling to match.

In the wider luxury sector, as many as 83% of luxury brand executives agree that customers are changing faster than their businesses can adapt, according to Accenture. Across markets, guests are re-assessing the value of luxury, seeking experiences that feel both more personal and more purposeful. Rising competition, changing attitudes around status symbols and generational shifts in values are pushing hospitality to rethink its offerings.

Meeting these demands will increasingly rely on intelligent tools that help to uncover and even anticipate individual needs, coordinate services across departments and create seamless guest journeys that start long before arrival on-site.

These shifts matter because they set the stage for what comes next, and hint at where AI and adjacent technologies could unlock greater value. Our latest Future:Poll™ data shows that 78% of luxury travellers feel very positive about hotels introducing new innovations and technologies, suggesting a readiness for solutions that make luxury more seamless and responsive.

In the section that follows, we explore four guest mindsets shaping the market.

78%

of UK and US luxury travellers feel very positive about hotels introducing new innovations and technologies

Source: Future:Poll™





Diriyah is exploring interactive technologies to enhance cultural storytelling – aligning with broader trends in cultural tourism that use immersive tools to enrich historical engagement and visitor education. Plans also include autonomous electric vehicles, smart utility management and a centralised digital platform that will allow guests to access accommodation, transport and experience bookings

EXPERIENCE ABOVE ALL

Opportunities are growing as luxury shifts from selling products to shaping lifestyles

Luxury’s evolution from goods to experiences is well documented. Today’s affluent consumers are shifting their spending from ownership to engagement as they prioritise travel, events and wellness pursuits over traditional consumption – a change in priorities that makes hospitality central to luxury’s future success.

This is already redefining the hotel proposition as forward-thinking brands start to move beyond promoting rooms and suites to marketing their restaurants, spas and cultural programming. Yet we are still at the beginning of truly bespoke, curated experiences that connect with individual guests on a deeper level.

‘Luxury is no longer about what you own, but about how you live,’ says Christopher Sanderson, co-founder of The Future Laboratory. ‘The most powerful experiences today are those that reflect who you are and what you care about.’

This comes as the wider luxury landscape undergoes an economic reshuffle. Aspirational consumers, once the sector’s growth engine, are feeling the squeeze. More than one-third (35%) have reduced or paused their luxury spending, while half say they now feel financially vulnerable, reports Boston Consulting Group (BCG). Meanwhile, BCG also finds that half of high-net-worth individuals (HNWIs) expect to increase their luxury spending by 5–25% over the next 18 months.

Spending patterns tell the story clearly. Bain & Co finds that luxury experiences grew 5% in 2024, while



personal luxury goods declined by 2%. Its H1 2025 update notes that experiential categories – from high-end hospitality to bespoke dining, cruises and private aviation – continue to outperform.

Luxury hospitality is especially well placed to meet these expectations. Some 70% of HNWIs surveyed by BoF Insights say that dining and hotel extensions have a positive impact on how they perceive fashion and beauty brands. Over 30% also report being more likely to purchase from a brand’s home collection after experiencing its hospitality services.

As we explored in Together Group and The Future Laboratory’s New Codes of Luxury: Longevity & Wellbeing Strategies report, wellness and beauty are also converging with hospitality – moving from niche add-ons to core expectations of the luxury stay. In the future, these eco-systems may extend even further, with hotels, spas, retail and residential spaces becoming holistic and lifestyle-driven.

‘As longevity continues to be a high priority for UHNWIs, luxury hospitality destinations will need to move beyond simply offering enhanced spa services,’ says Madeleine Boyd, global senior vice-president of beauty and wellness at Together Group. ‘All aspects of the hotel experience will need to be re-imagined through the lens of wellness and longevity.’

What this means:

The ongoing shift towards experiential luxury is driving convergence between sub-sectors such as lifestyle, hospitality, wellness and even retail. Hotels that successfully create personalised experiences in this vein will be best placed to capture new value and deepen engagement with their guests.

1 in 5

UK and US luxury travellers prioritise innovative technology in-room and on-site when booking a hotel

Source: Future:Poll™

DISTINCT BY DESIGN

Discernment is the differentiator as travellers seek stays with a clear point of view

Luxury travellers are moving beyond mere brand recognition. Instead, they seek once-in-a-lifetime, memorable experiences. This shift concerns the substance of the stay itself – making each itinerary feel distinct and tied to the destination or property’s unique point of view.

Luxury’s value equation is coming into question, as widespread premiumisation means too many ‘exclusive’ experiences are no longer truly exclusive. In other words, increasingly discerning luxurians are thinking twice about where and how they spend, and providers of travel experiences and hotel stays will need to work harder to win.

The data makes this clear: half of ultra-luxury travellers define luxury as ‘once-in-a-lifetime experiences’, while more than a third (35%) seek itineraries designed by local experts (source: Flywire). The desire for culturally immersive experiences remains strong, according to the 2025 edition of Julius Bär’s Global Wealth and Lifestyle Report, with some 50% of respondents across all regions saying they like to travel as much as possible and discover other cultures.

Elsewhere, there are signals that exclusivity and access remain key markers of value, with 55% of luxury consumers in the US having turned to concierge services to secure insider access to in-demand restaurants or VIP entry to sell-out shows (source: Vogue Business and Capital One). Here, access is a marker of distinction and curation – doors opened to experiences that reflect the locality.

Taking this even further, UHNWIs – those with more than £22.5m (\$30m) in assets – reportedly prefer a quiet, more removed style of luxury, such as remote, private destinations, accessible via private airports or helipads that feature tailored experiences available nowhere else, according to McKinsey & Co. Even in such destinations, technology will be increasingly central to deliver excellence.

What this means:

Stays must feel unrepeatable, whether through cultural immersion, ultra-exclusivity or one-of-a-kind design, culinary and wellness experiences. Brands that continue to rely on templated programming or diluted brand identities will progressively lose ground to culturally rooted, agile rivals.



50%

of ultra-luxury travellers define luxury as ‘once-in-a-lifetime’ experiences

Source: Flywire

Shebara resort by Red Sea Global, Saudi Arabia

‘In a world that feels unpredictable, travellers are paying to know that they’re in capable hands. Luxury, at its best, is foresight in action – the sense that if anything goes wrong, it’s already being fixed’

Martin Raymond, co-founder, The Future Laboratory

Event Log
11:30 AM

Set

Light and Sound Ambience

 to

Present Mode

Morning Flow

 due to balanced conditions.

Welcome Zone
Welcome Mirror

Saturation: High

Distortion: Low

Temperature: Warm

Hue: High

At 113 Spring in New York, FIELD.IO uses AI-driven spatial intelligence to create personalised, nature-inspired wellness experiences that adapt seamlessly to each guest

ASSURED EASE

Peace of mind – knowing that every detail has been thought through – is priceless

For many, luxury is no longer the freedom to choose, but the confidence that everything has already been taken care of. Flywire research shows that 40% of luxury travellers now define luxury travel as ‘having someone take care of all the arrangements’ – meaning peace of mind is part of what guests truly value.

The market is responding. Virtuoso reports a 76% increase in clients turning to advisers, with three in four citing safety and security as their top concern.

For 65%, this extra layer of protection outweighs traditional markers of value such as upgrades or VIP perks. At the highest levels, premiumisation is extending to logistics too: airside pick-ups, luggage shipping, fast-track immigration and off-season itineraries are now part of what luxury travellers are willing to pay for (source: Travellustre, NBC).

Across the board, consumers most often associate luxury with feeling relaxed, comfortable and cared for (source: Morning Consult). The implications for brands stem from a deeper psychological shift. ‘In a world that feels unpredictable, travellers are paying to know that they’re in capable hands,’ says Martin Raymond, co-founder of The Future Laboratory. ‘Luxury, at its best, is foresight in action – the sense that if anything goes wrong, it’s already being fixed.’

Luxury travel company Black Tomato has formalised this expectation with what it calls The Rider, a personal list of essentials for each customer that takes cues from the music and entertainment industries. ‘It means that wherever people go in the world, the things that matter to their family travel with them,’ explains Tom Marchant, co-founder of Black Tomato. ‘That drives retention and trust.’

Advance booking patterns show that the number of luxury hotel reservations made one to two years in advance increased in 2024 (source: Bain & Co and Fondazione Altagamma). Meanwhile, a striking 93% of HNW travellers in Asia-Pacific prefer to return to destinations they already love, with 89% saying they are more likely to revisit places where they feel a meaningful connection (source: Marriott International).

What this means:

In today’s market, confidence is a real luxury currency. Guests want essentials like security, logistics, priority access and seamlessness to be guaranteed. For many brands, this is an untapped opportunity – especially as most booking journeys still compete on price rather than experience.

SERVICE THAT REMEMBERS

Guests now expect intelligent, evolving and human service that travels with them

While privacy remains a priority for many luxury travellers, this does not mean they want to remain unknown. Relationships have always been central to luxury hospitality, but expectations of what those relationships look and feel like are changing. Guests now seek a deeper sense of recognition – with service that remembers, adapts and evolves with them.

That extra level of tailoring now separates a memorable stay from a merely functional one. As Tamara Lohan, co-founder of Mr & Mrs Smith, explains: ‘There is something magical about going to a hotel you’ve been to before and the GM comes up and recognises you and smiles and says ‘welcome back’. I don’t care what system is in the background – it’s the human connection that matters.’ But herein lies the issue of scalability as brands grow and go multi-national.

Luxury travellers who responded to a recent McKinsey & Co survey are two to three times more likely than mass travellers to say their main reasons for travelling are to meet new people. The same research reports that many of this cohort now want 24/7 concierges who will maintain a relationship with them across their journeys. Younger travellers, meanwhile, are reportedly gravitating towards subscription-based travel clubs that give paying members access to an exclusive, curated selection of properties, activities and agency services.

The luxury travel market is now also welcoming five distinct generations travelling at the same time. Multi-generational luxury travel is surging, with brands

like Shangri-La designing offerings for families spanning three or more generations. On the other hand, women now make up 68% of solo journeys booked through Virtuoso, pointing to the rise of a more diverse travel economy.

It is important to remember that luxury consumers are not a monolith. For some, recognition and relationship-building are the height of luxury hospitality. Others prize minimal contact and maximum privacy. Brands need to be able to flex across this spectrum, adapting seamlessly to their guests.

As these expectations evolve, The Future Laboratory’s research suggests the wider luxury eco-system is undergoing a similar shift towards long-term, relationship-based models. Since 2022, it has been tracking the rise of Guilded Luxury, a macrotrend repositioning luxury brands as modern members’ clubs through tiered access, bespoke benefits and personalised services.

Increasingly, this means offering very important clients a white-glove service that spans every aspect of their lives. ‘For top clients, the luxury brand is transforming into a travel agent, hotelier and cultural compass, always providing a five-star service,’ says The Future Laboratory’s Sanderson.

What this means:

Knowing when to lean in and when to step back is critical. Hotels that can flex seamlessly between recognition and privacy will unlock a more dynamic, relational kind of luxury – attuned to contextual needs, generational dynamics and the demand for service that feels more personal.

‘For top clients, the luxury brand is transforming into a travel agent, hotelier and cultural compass, always providing a five-star service’

Chris Sanderson, co-founder, The Future Laboratory



At Neko Health Manchester, each visit includes a dedicated account and tailored support, ensuring warm, individualised care

Part two

FUTURE AI FRONTIERS

AI is emerging as a powerful tool with real scope to reshape the guest experience. While many brands are still in the early stages of their AI journey, the opportunities are clear: to simplify fragmented systems, deliver frictionless convenience, and anticipate and adapt to guests in real time.

Behind the scenes, AI is slowly starting to shape how hospitality operates. It can be deployed to mine and distil vast amounts of data, anticipate demand and support decisions across pricing, inventory and even menu-planning. Its use in metrics such as reviews and performance data can also give brands insight into guest satisfaction and service quality. Together, these developments point towards a more responsive, data-driven approach to both operations.

‘The best way to rationalise how AI works is to imagine you had an unlimited number of humans,’ says Brad Fry, co-founder of Together Group. ‘In luxury hospitality, that would mean a researcher reviewing every piece of guest information and briefing staff before each interaction so they can deliver exactly what that person needs, with full context. Of course, that’s not economical to do with people – but AI can deliver all that insight at a fraction of the cost.’

AI is still under-used in luxury hospitality, according to Mark Noë, founder of Noë & Associates, a consultancy that delivers brand strategy and identity, content and production with a focus

on premium brands, architecture and the built environment. ‘Over the next decade, its true potential will lie in enabling hyper-personalised journeys and seamless, anticipatory service at scale – moving beyond automation to create new standards of emotional intelligence,’ he says.

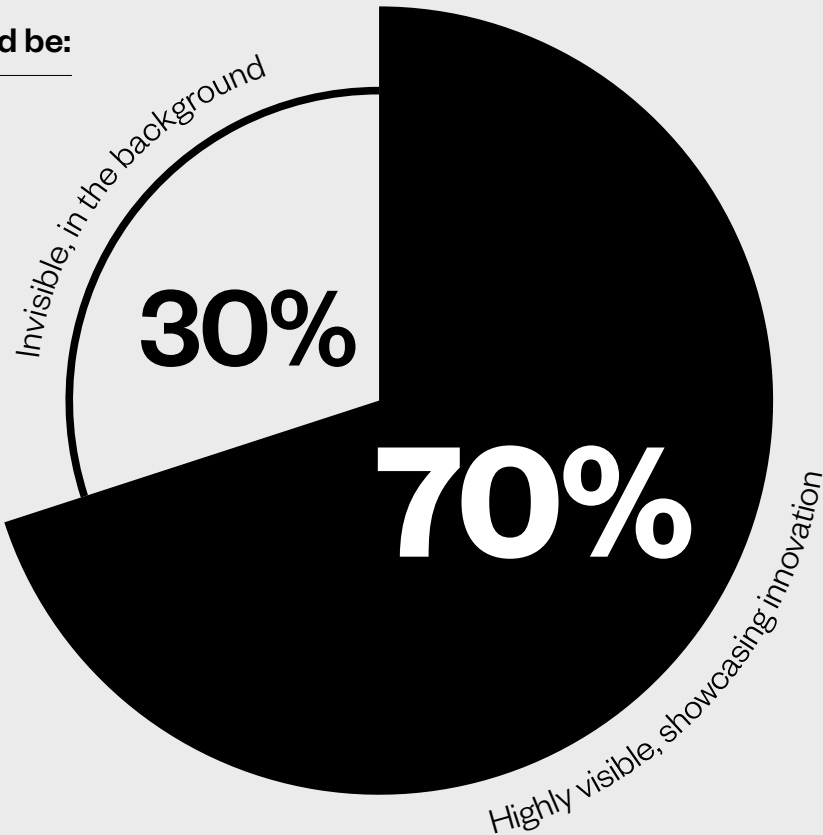
But how AI is introduced will be as important as what it delivers. Our Future:Poll™ data shows a clear tension: 70% of luxury travellers want technology to be highly visible as a marker of innovation, while 30% say the best use of AI is when it works invisibly in the background. For hotels, the challenge is deciding when to spotlight tech – and when to let it empower the human touch.

‘Personalisation is key in luxury and ultra-luxury hospitality,’ says Alex Schellenberger, global chief brand and marketing officer at Mandarin Oriental. ‘What is important is, on the one hand, side recognition, so recognise me. Number two is what we call moments of delight, so surprise me. And number three is what I would call anticipatory service, so know what I want. We always say the best service is the one that you deliver before even asked.’

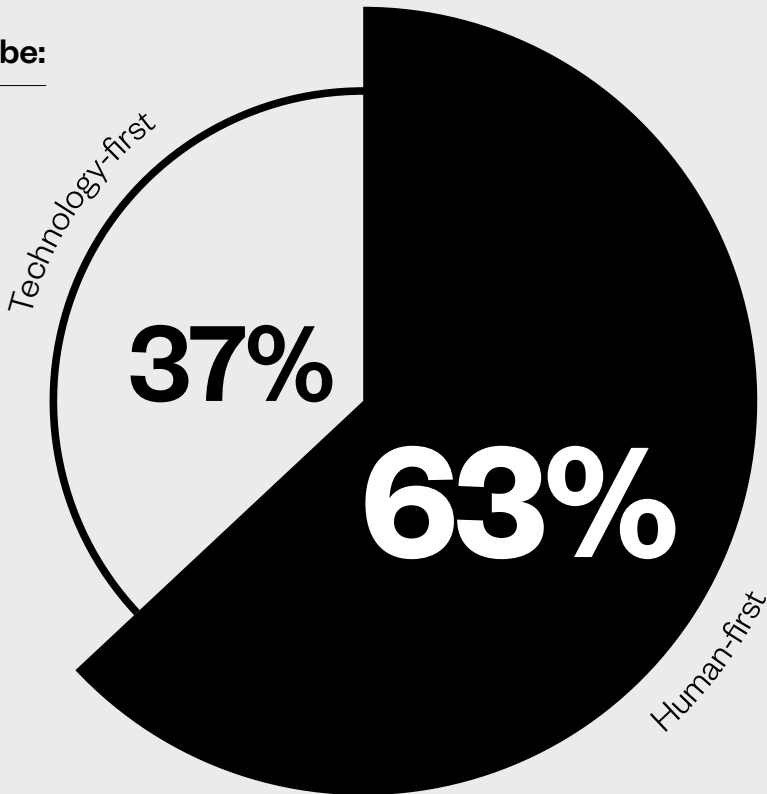


Future:Poll™

Technology in
hospitality should be:



Service in
hospitality should be:



Bringing this future of AI in hospitality to life will depend as much on invisible infrastructure as on guest-facing innovation. As Dave Benton, founder of Metajive, which specialises in digital experiences and AI solutions for leading brands, explains, many hotels are still running on fragmented legacy platforms. The result is inconsistency for guests and inefficiency for staff. ‘The opportunity with AI isn’t just in what it shows the guest, but in stitching those systems together so everything feels seamless,’ he says.

This foundation matters because without integrated systems, AI cannot deliver on its promise of personalisation, fluid journeys or elevated service. A connected digital infrastructure can ensure that data travels with the guests, and enables staff to act with confidence and brands to maintain consistency across every interaction.

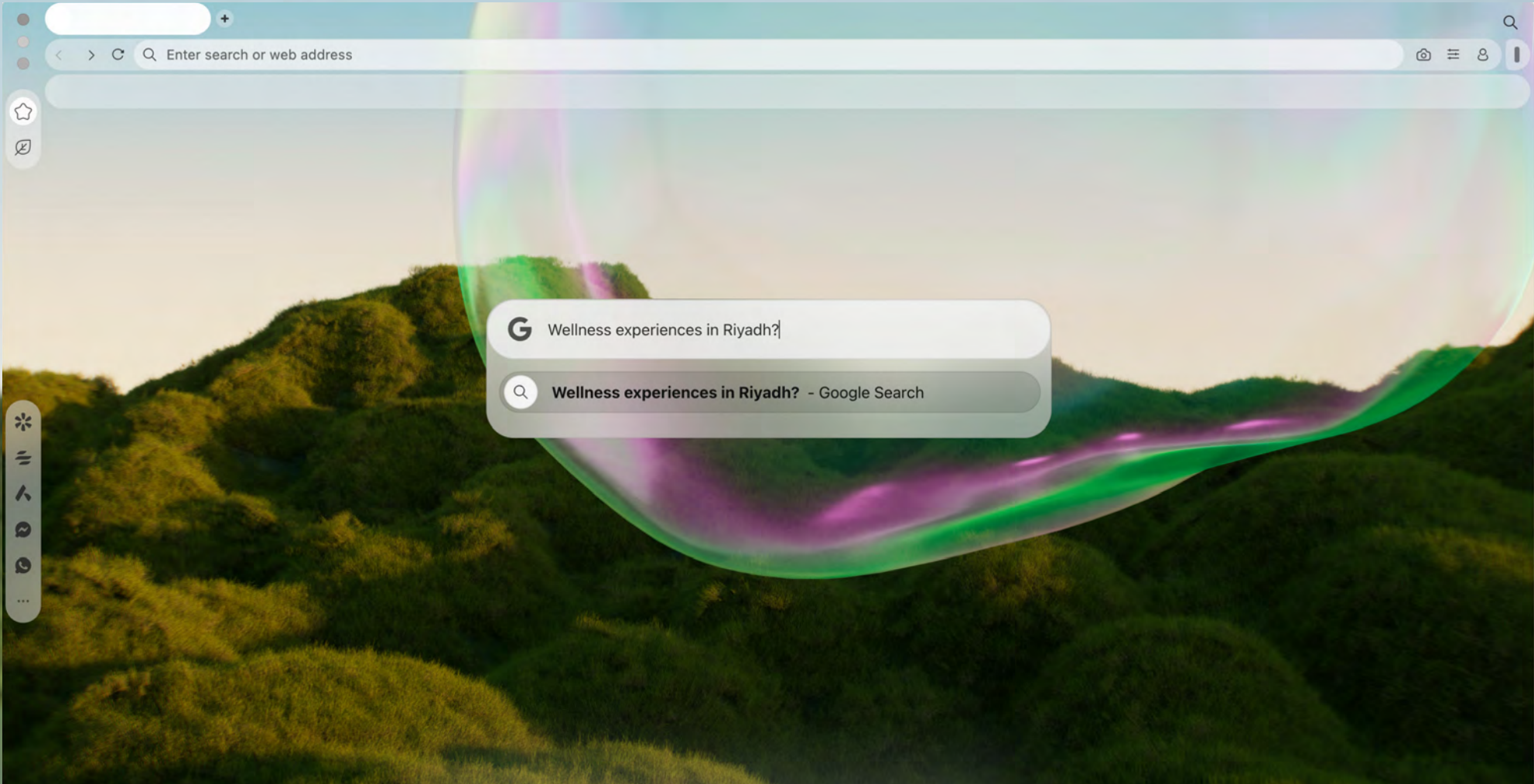
‘Over the next decade, AI’s true potential will lie in enabling hyper-personalised journeys and seamless, anticipatory service at scale’

Mark Noë, founder, Noë & Associates

Alongside AI, digital twin technologies – as we explored in our New Codes of Luxury: Immersive Technologies for Transformation report – can open up new possibilities for both design and delivery. By creating precise, visually rich and data-driven digital replicas of hotels and resorts, brands can let guests explore rooms and amenities virtually before booking. These models can also personalise what each guest sees; for example, reviewing a room configured to their desired set-up to make choices feel instantly relevant. The same models can be used to optimise real-world operations, such as tracking guest flows, energy use and occupancy, and help teams to iterate spaces and experiences in real time.

Equally, similar principles could be applied at the individual level, with dynamic, privacy-safe models of very important clients allowing brands to anticipate needs and design hyper-personalised service journeys.

In this sense, the right technology stack is not simply functional – it is the enabler of the luxury experiences explored in this section of this report.



Opera Air is a discovery browser that combines wellness tools like guided breaks and binaural beats with an integrated AI assistant to help you focus and search better, Norway

CURATED DISCOVERY

Discovery – of dining, culture, activities and local experiences – is central to luxury hospitality. AI has the potential to act not only as a recommender but also as a taste-making layer for curation and context. But brands must set guardrails so AI curation reflects the property’s aesthetic, locality and culinary point of view to avoid generic outputs.

Discovery, however, starts long before guests arrive. ‘As travellers increasingly turn to AI platforms like ChatGPT for inspiration, we’re exploring Generative Engine Optimisation to stay ahead of the curve,’ says Metajive’s Benton. ‘SEO has always been a core KPI, and now it’s about ensuring brands appear where discovery is happening – in AI-driven searches that are shaping the future of travel and luxury.’

Once on-site, AI’s role shifts. By drawing on guest context, preferences and mood, AI can assemble curated itineraries – from dining and culture to wellness and local exploration – that align with both

guest expectations and brand identity. Human staff remain the bridge here, refining and adding nuance, but the scope of what can be offered expands. Discovery becomes less about ‘what’s available’ and more about ‘what feels right for me, right now’.

This is important because how travellers want to connect with destinations is changing. ‘Travellers want to experience somewhere as though they were part of the place, not just visiting,’ explains Georgia Fendley of Construct London. ‘That means genuinely integrating with local communities and living like the most connected local would. Delivering that is a concierge to the nth degree – and only AI could really do it.’

Among UK and US luxury travellers, more than half (59%) say they would personally use AI-powered recommendations for dining, spa and activities. Almost as many (44%) agree that AI could make luxury experiences feel more tailored and exclusive than they are today (source: Future:Poll™). This suggests discovery could be one of the clearest entry points for AI in hospitality.

But the opportunity depends on strong branding. ‘The machine is only as good as what you feed it,’ explains Mandarin Oriental’s Schellenberger. ‘So, be very clear and specific about your brand fundamentals, your brand tone of voice, your brand style guide, how you want this interaction to be done and to be shaped.’

This could mean AI concierge systems that combine guest profiles with live availability to propose the best options, or itinerary-builders that account for transfer times, weather shifts and mood. As guests move through spaces, location-enabled guides could unlock property-specific art, wellness or family trails. Beyond this, emotional curation – like Black Tomato’s Feelings Engine, which recommends travel itineraries based on how guests want to feel – shows how discovery can evolve into something more atmospheric.

If a hotel has its own app, a light-touch ‘now/nearby’ function could scan local calendars, weather and events programming to suggest serendipitous moments like sunsets, pop-ups or openings, filtered through the brand lens.

What this means:

From a discovery perspective, AI can expand the range of what hotels offer, but only if it is trained on brand fundamentals and rooted in a sense of place. Done well, it could help ensure that every recommendation made feels both personal to the guest and authentic to the brand.

SEAMLESS JOURNEYS

AI is becoming the hidden driver of effortless travel – one that ensures consistency before, during and after the stay. Guests increasingly expect smooth, predictable flows: from pre-arrival prompts to in-stay adjustments and post-stay follow-ups. Here, AI has the potential to strip away friction from every stage of the guest journey, so that the focus of the stay becomes about flow and ease.

‘The most obvious and immediate use case of AI in luxury travel is the idea that intelligent systems can reconfigure every leg and stage of a trip based on real-time delays or changing traveller preferences,’ says Tony King, founder of King & Partners, a full-service agency specialising in lifestyle, hospitality and real estate.

As agentic AI – capable of reasoning, taking initiative and executing tasks autonomously – matures, it could evolve into a truly frictionless travel companion, able to coordinate bookings, adapt itineraries and resolve issues.



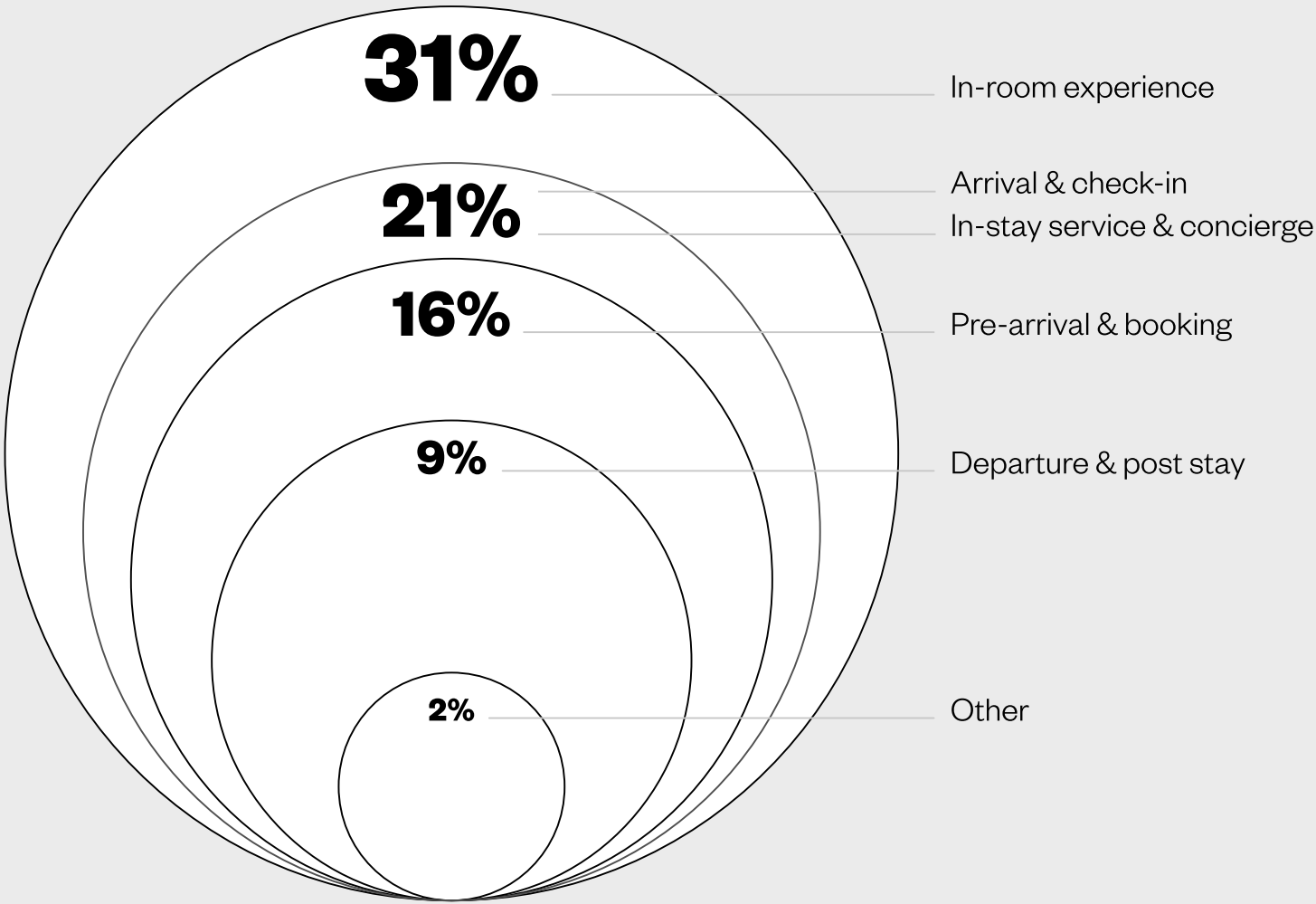
The Afterglow private jet cabin with bespoke circadian lighting by JPA Design allows passengers to rest and reduce jetlag, London

‘The most obvious and immediate use case of AI in luxury travel is the idea that intelligent systems can reconfigure every leg and stage of a trip based on real-time delays or changing traveller preferences’

Tony King, co-founder, King & Partners

Future:Poll™

Which stage of the hotel guest experience would you most like AI to improve?



In this sense, however, AI’s potential also extends beyond the hotel itself. In Saudi Arabia, for instance, it is being built into new destinations from the ground up. ‘We see AI as an enabler of destination efficiency, especially for the Kingdom, given that we are creating destinations from scratch,’ says Ada Renedo, regional CEO, Middle East at Together Group.

In our Future:Poll™ survey, 31% of respondents said they most want AI to enhance the in-room experience, followed by check-in and in-stay service (both 21%). Almost half (48%) see faster service as the biggest benefit AI could deliver, while 59% said they would use automated requests for housekeeping, amenities or mobile check-in. Translation is another major opportunity, with 65% reporting they are very comfortable with hotels using AI to remove language barriers.

For brands, this also means consolidating the journey into unified channels such as proprietary apps or portals, while deploying behind-the-scenes tools that give staff the information and confidence to act in real time. ‘If you’re booking a room in one place and a table in another, the hotel should already know that. AI should remove the duplication,’ says Metajive’s Benton.

One of the major benefits is extending brand control. By housing bookings, communication and service requests in a single, owned channel, luxury hotels reduce fragmentation and maintain a more consistent, end-to-end experience.

In practice, this means using AI to plan and pre-book personalised itineraries before arrival, bringing upgrades, payments and alerts into a single guest portal, and offering opt-in, privacy-safe biometric check-in where appropriate. On-property, multi-lingual chatbots are already starting to prove their worth. A simple on-app or in-room voice assistant could also route requests straight to staff, while occupancy data can help fill last-minute spa or wellness slots. Lastly, smart wayfinding would keep larger properties and events running smoothly.

What this means:

In luxury, friction is the enemy of flow. AI offers hotels the chance to collapse silos, anticipate disruptions and deliver quieter, more effortless guest journeys from booking to check-out. Brands that harness it well will transform predictability and ease into a metric of service excellence.

Felipe MacLean, founder and CEO, Yntegra Group *on helping guests feel at home*

‘AI will allow guests to feel truly at home, even while away,’ says Felipe MacLean, founder and CEO of Yntegra Group, a Miami-based investment firm leading transformative hospitality developments in Exuma, including a dynamic portfolio of private islands and more than 367 acres of prime land.

For MacLean, the opportunity lies in continuity – creating a sense of familiarity and wellbeing wherever guests go. ‘By understanding and adapting to individual preferences, hotels will be able to recreate familiar routines and comforts, helping guests stay longer without losing touch with their daily habits and wellbeing practices,’ he explains.

‘Through AI-driven systems, guests will seamlessly integrate personal data and routines into their stay – from ideal bed elevation and room temperature to tailored wellness programmes – creating a continuation of their lifestyle.’

At Yntegra’s Rosewood Exuma development, this philosophy is being put into practice. ‘We are ensuring that every touchpoint of the guest journey is seamless, meaningful and deeply personalised,’ says MacLean. ‘AI will be pivotal in realising this vision by enabling us to deliver a transformative hospitality experience that redefines the future of luxury travel.’



A signature amenity at Rosewood Exuma, the Floating Padel Court by Yntegra Group offers guests an immersive connection to sport and nature

‘I do hope that AI finally allows us to personalise properly. We’ve been playing around the edges, but never at the individual level. That’s about to change’

Tamara Lohan, co-founder, Mr & Mrs Smith

PERSONALISATION AT SCALE

AI will make it possible to deliver bespoke experiences for every high-value guest. As well as remembering room preferences, hotels will be able to better anticipate context – from the purpose of a trip to a guest’s mood. But, as ever, tensions exist between personalisation and privacy, so the balance is to personalise without intrusion, with explicit opt-ins and visible controls, while minimising third-party data-sharing.

As previously mentioned, nearly half (47%) of UK and US respondents to our Future:Poll™ survey said they would pay 5–10% more for a highly personalised stay, with tailored activities or customised room settings cited as examples. A further 62% said they are very comfortable with hotels using AI to make recommendations. Privacy concerns remain, though, with 55% flagging data privacy as their top issue, and 41% saying sharing identifiable information with third parties would actively deter them.

For Tamara Lohan, co-founder of Mr & Mrs Smith, the opportunity is clear: ‘I do hope that AI finally allows us to personalise properly. We’ve been playing around the edges, but never at the individual level. That’s about to change.’

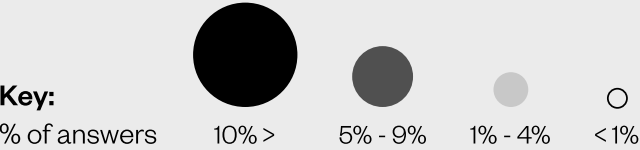
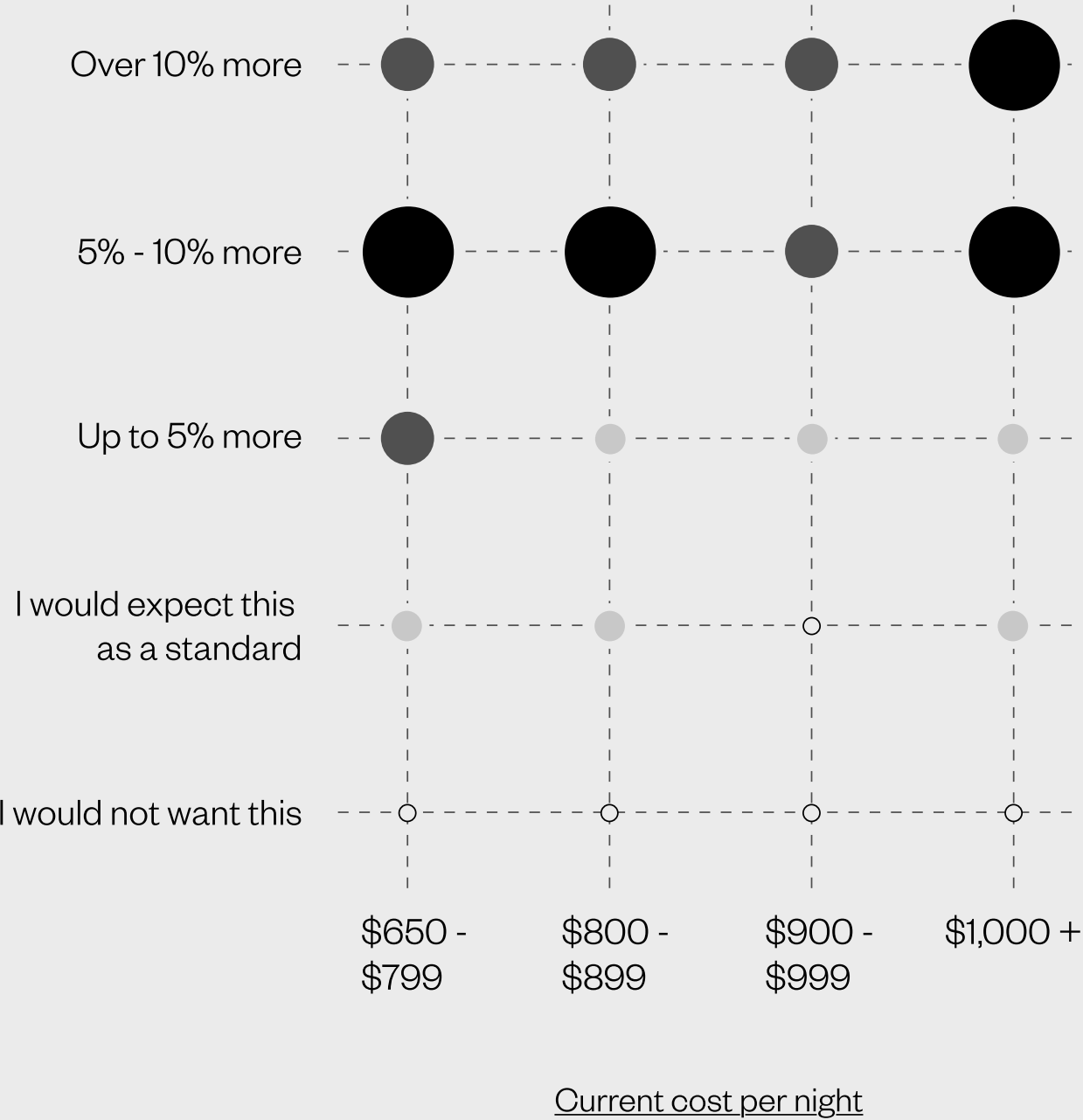
Hotels must start to connect previously disjointed guest datapoints, and move towards a ‘one guest, one profile’ eco-system. Instead of fragmented records across properties or channels, AI could unify data into a living profile that travels with the guest – not only remembering preferences, but also trip purpose and context. For brands, this calls for a rethink of CRM, where communications feel like a personal invitation rather than marketing to simplified audience segments.



Random Studio created an immersive retail set-up where AI read visitor expressions to produce personalised brand messages, France.

Future:Poll™

How much extra guests would be willing to pay for a luxury hotel stay if it offered a highly personalised experience



‘What used to happen is that you might have had five different profiles because all of the systems work in isolation,’ explains Mandarin Oriental’s Schellenberger. ‘But using AI, we are able to have one combined knowledge, with all your preferences and past likes. So, we can now move into a much more personalised experience, where the data travels across the different touchpoints.’

‘AI could allow properties to move beyond siloed systems by integrating booking, dining, spa and loyalty platforms into a single profile that updates in real time,’ says Together Group’s Fry. ‘In-room controls could load a guest’s preferred lighting, climate or sleep settings at check-in. Apps could surface wellness options when relevant. And CRM could evolve into context-aware messaging that acknowledges trip purpose, whether it’s for business or a family holiday.’

Behind the scenes, this vision depends on systems that can talk to one another securely. Open standards such as Model Context Protocol (MCP) – which allows AI models to interact with tools and APIs in a controlled way – will make it easier for brand-owned AI agents to connect with partner platforms, manage inventory and coordinate bookings without compromising guest privacy.

What this means:

Scalable personalisation can raise service levels, strengthen brand positioning and help mid-tier brands elevate their experience at a fraction of the cost. Success depends on secure, self-hosted models, transparent data exchanges and unified guest profiles that shape each stay around preferences.

In collaboration with design label Things From, Le Meurice has re-imagined Suite 1835 as a sensory experience that blends the hotel’s heritage architecture with AI-driven visuals, contemporary design and immersive technology, Paris



AUGMENTED HOSPITALITY

In luxury hospitality, service has always been about the human touch. The role of AI is not to replace this but to augment it by shifting what excellence in service looks like. And across AI implementation, it remains important to ensure there are visible cues that reassure guests that humans are still in charge.

In future, AI adoption will reframe roles and, ultimately, elevate expectations. The right tools can open space for hotel staff to lean into what makes hospitality distinct and luxurious. By reducing the operational load and freeing staff to focus on the guest experience, roles can refocus on high-touch moments such as welcoming, hosting, problem-solving and guest departure.

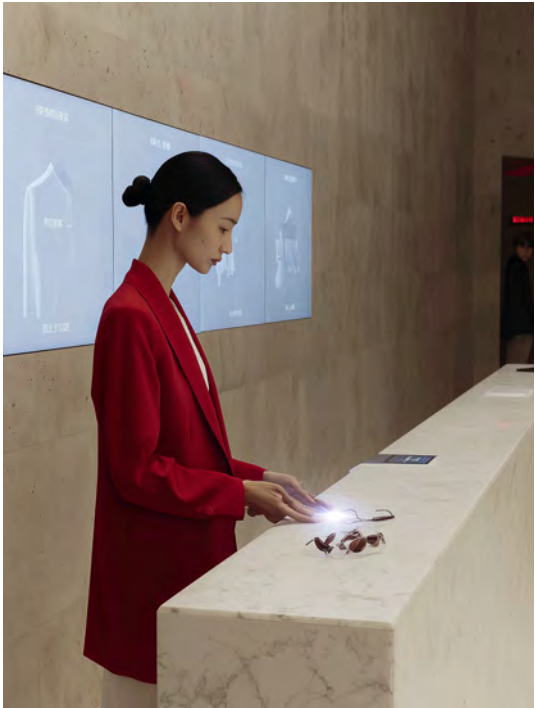
‘AI can do 70% of the mundane, but we want our people spending 100% of their time on the 30% that matters,’ explains Black Tomato’s Marchant. Mr & Mrs Smith’s Lohan echoes this: ‘AI should clear out the clutter and leave humans to create the memories and connections that only a human can deliver.’

This balance is critical, but not easy to achieve. Nearly two-thirds (63%) of luxury travellers say service should be human-first, not technology-first, while 46% say they would value AI if it gave staff more time to spend with them. Yet 40% caution that too much automation risks losing the essence of true luxury service (source: Future:Poll™).

‘Front-of-house staff equipped with AI-powered apps could anticipate guest needs and resolve issues faster, while still owning the guest relationship,’ says Metajive’s Benton. ‘A staff voice note flow could log micro-interactions, which AI then rolls into the guest profile for the next touchpoint.’

In practice, we might also see guest management systems that flag sensitivities and preferences before every interaction, back-of-house portals that auto-route service requests or predictive maintenance that fixes problems before they affect a stay. As administration-heavy roles are redefined, reception and concierge teams could evolve into more experiential hosts, rather than simply managing.

There are opportunities to turn operational efficiencies into creative brand stories and experiences too. Culinary teams, for example, could use AI to optimise supply chains and preparation schedules, freeing chefs to experiment and innovate. Or, drawing on data shared, wellness teams could tap into AI to design personalised recovery or nutrition programmes.



AI imagery by The Future Laboratory

What this means:

The true AI opportunity is creating space for the human touch, not efficiency for its own sake. Brands that strike this balance will run smoother operations and deliver richer guest relationships – precisely because the machine is carrying the invisible load.

Michael Grieve,
chief brand officer, Jumeirah Group
on keeping luxury human

‘There’s a fallacy that AI takes away human touch and, dare I say, when I look further into what luxury will be in the future, it’s only going to get more personalised and become even more human,’ says Michael Grieve, chief brand officer at Jumeirah Group. ‘We won’t lose the human interaction.’

For Grieve, AI’s potential will raise the bar for brands. ‘What AI is going to do is give us a greater toolbox to use, so the pressure will actually be put back on us,’ he explains. ‘Our guests will know the potential of AI and will

expect us, as a brand, to be able to leverage that potential to elevate the experience standard that they have when they’re with us.’

He continues: ‘I think it becomes an absolute complement and an amplifier of what we already do. Of course, it gives you access to data and information far quicker, with more precision than what we have had historically. In general, we look at it as a very positive component of the customer experience, which gives us an opportunity to truly tailor and personalise everyone’s experience.’



At Marsa Al Arab, by Jumeirah Group, the lobby design captures the essence of Dubai’s landscape, shaped by both the desert and the sea.

HOSPITALITY'S DIGITAL TRANSFORMATION

Part three

AI is redefining what operational excellence and service mean in luxury hospitality. But transformation will not look the same for all brands.

For new entrants, AI represents a fast track to future advantage. For legacy players, it demands a shift from pilot experiments to deeper integration.

But the brands that apply AI most intentionally – rather than simply race to adopt it first – will be the ones set to gain a major edge in the future.

For many, AI’s near-term role will not be to replace the stack, but to connect it by better linking existing systems. According to Together Group’s Fry, the priority should be a modular, composable architecture that connects what works today and swaps components as needs evolve. ‘Crucially, falling build costs and faster tooling will quickly make bespoke solutions far more attainable – lowering the barriers to entry,’ he says.

The key is not to throw myriad tools at staff and guests, but to ideally begin with a bespoke AI strategy – even if modest in scope. This should be rooted in a brand’s purpose, core frustrations and service ambitions. The focus here should be on identifying where intelligence can meaningfully enhance experience, reduce friction and bring brand values to life in relevant, differentiating ways.

For leaders, these systems – once mature – could also condense millions of signals into clear dashboards showing what’s working, what’s at risk and where to intervene, without needing to outsource lengthy external studies.

Looking ahead, the next frontier will be agentic AI – systems capable of reasoning, taking initiative and acting autonomously within defined brand parameters. In hospitality, this could mean AI concierges that not only respond to requests but also proactively coordinate bookings, anticipate disruptions and adapt to evolving guests’ needs in real time. Some oversight here will still be needed.

A clear distinction will also emerge between brands that are AI-enabled, AI-powered and AI-innate. AI-enabled businesses use intelligent tools to support discrete functions such as pricing or scheduling. AI-powered brands embed connected systems across departments to drive end-to-end visibility and decision-making. AI-innate businesses go even further, and treat intelligence as part of their DNA, so that every operational process is informed by data-driven insight.

Here, we outline the starting points for both challenger and legacy players.



AI imagery by The Future Laboratory

‘Crucially, falling build costs and faster tooling will quickly make bespoke solutions far more attainable – lowering the barriers to entry’

Brad Fry, co-founder, Together Group

Dave Benton, founder, Metajive

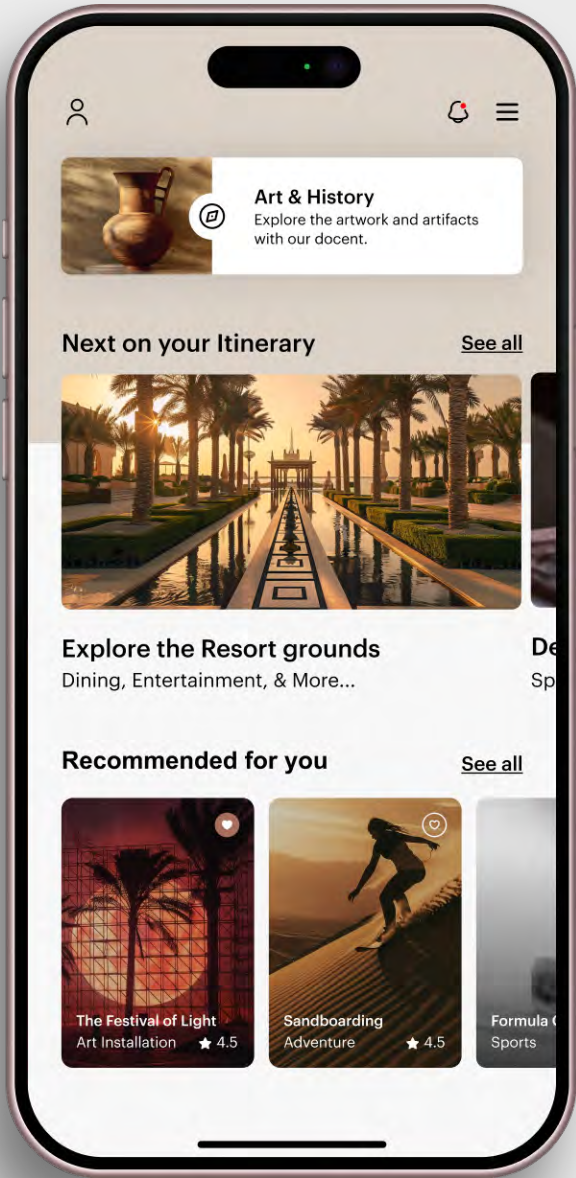
on the reality of AI transformation

‘Everyone’s talking about it, but no one’s doing it,’ says Dave Benton, founder of Metajive, describing the state of AI in hospitality today. The conversation around AI must shift from optimisation to value creation. ‘Everyone’s focused on squeezing 12 more cents out of every dollar,’ he says. ‘But that’s a short-term outlook.’ Instead, brands should see AI as a tool for long-term growth – a way to provide more value rather than simply capture it.

Benton believes that brands need to ‘focus on driving a better experience, not a more efficient standard’. That means embedding intelligence within day-to-day operations before turning it outwards to guests. ‘You don’t start with the AI talking to your consumer,’ he explains. ‘You start with the AI talking to your staff.’

The true value of AI in luxury hospitality lies in patience and precision, not speed or scale. ‘If I were serious about AI as a brand, I would think of it as a multi-year project, with a small up-front system integration to just get the data in one place,’ he says. ‘Then I would think of it as a gradual roll-out – the same dollar amount every month for three years.’

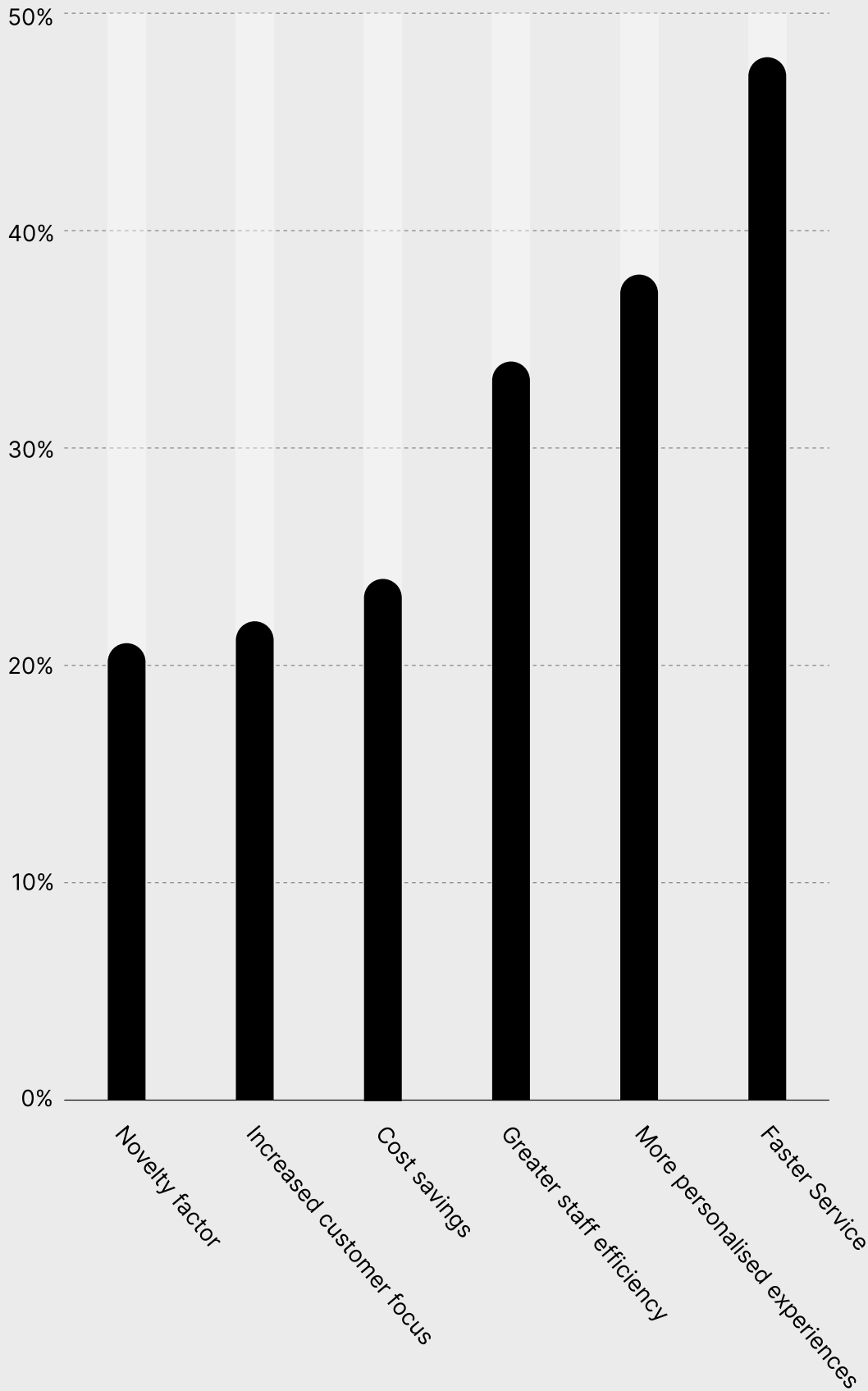
This, he explains, is the essence of a crawl–walk–run approach: start small, learn fast and scale smartly as systems, data and capabilities evolve.



The Future of Hospitality, where guests can curate local experiences and receive personalised recommendations, imagined by Metajive

Biggest benefits to hospitality venues using AI?

Future:Poll™



Opportunities for Challenger Brands

Leap-frogging legacy through intelligent infrastructure



1. Start with service design, not software

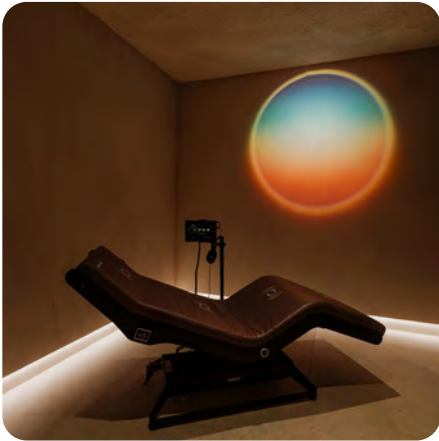
Map the end-to-end guest journey and experience – including an AI-enabled discovery phase – before investing in technology. Design the system as if you had unlimited staff anticipating every guest’s need.



2. Adopt a composable architecture

Build flexible, modular systems that can evolve as technology does. With the pace of change accelerating, brands should prioritise architectures that are adaptable, interoperable and vendor-agnostic.

Clockwise from bottom left: Google DeepMind; AI imagery by The Future Laboratory; Nao Longevity Hub at the heart of Minos Palace Resort, Crete; The National Gallery Supporters' House private club is a new cultural hotspot open to its members, corporate supporters and donors, London; The Afterglow private jet cabin with bespoke circadian lighting by JPA Design allows passengers to rest and reduce jetlag, London



3. Train your agents like your employees

Teach AI systems as you would staff – on brand fundamentals, tone of voice and service philosophy. Doing this means, as you scale, every interaction with AI still feels on-brand – and not generic.



4. Embrace rapid iteration

Launch small experiments, measure impact, then refine in real time using live guest feedback. A test-and-learn culture allows challengers to move faster than legacy brands potentially locked into slower upgrade cycles.

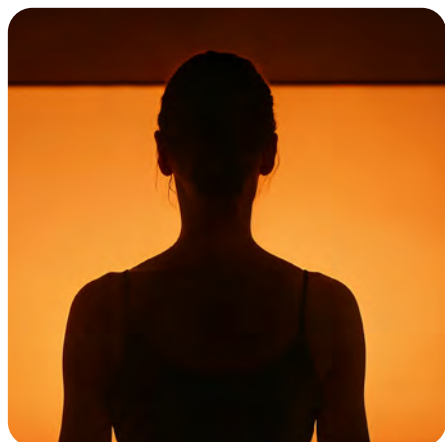


5. Make seamlessness your signature

Let automation remove friction and streamline administration, so staff can focus their attention where it matters most. When everything flows – from pre-arrival messaging to checkout – it becomes a marker of luxury.

Quick Wins for Legacy Brands

Bridging the innovation gap without diluting brand identity



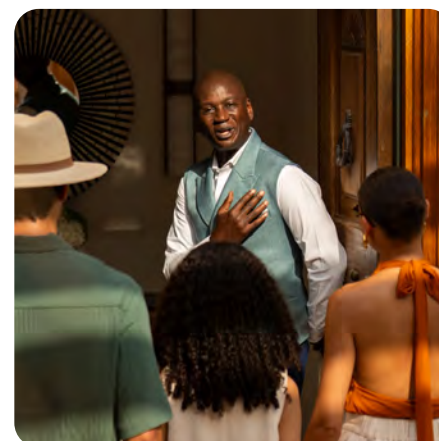
1. Focus on data collection

Start by gathering as much data as possible, in any format. The richer the data, the better brands can train their models and give AI the context needed to deliver smarter, more personalised service. Context is king.



2. Expose legacy systems for AI

Make existing systems accessible via APIs and shared identifiers. This allows AI to create a unified guest profile from multiple platforms – a practical step towards the ‘single customer view’ many brands aspire to.



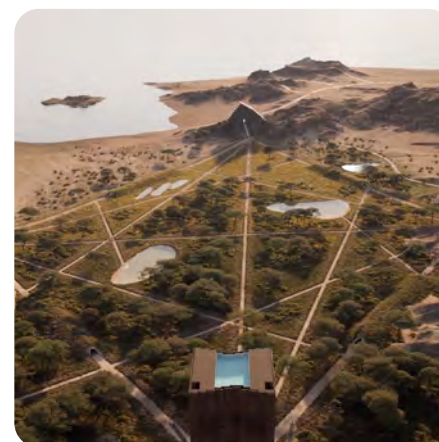
3. Use AI to amplify the human touch

Deploy AI to take on repetitive or administrative tasks instead of valuable guest interactions. By freeing time and focus, staff can invest more energy in meaningful, high-touch moments that create loyalty.



4. Equip teams for augmented roles

Train staff to be both digitally literate and grounded in brand fundamentals. When employees understand how to use AI and brand storytelling to unlock service excellence, it elevates the guest experience.



5. Experiment fast, then scale

Focus on quick, low-cost experiments rather than large pilots. Test ideas, prove what works, and scale the initiatives that most clearly enhance experience or efficiency. Small, well-measured wins build credibility.

Digital Twins

Extending luxury hospitality through immersive, data-driven simulation

As AI reshapes operations and service, its coupling with digital twins marks the next evolution of intelligent hospitality. Building on insights from our **New Codes of Luxury: Immersive Technologies for Transformation** report, these dynamic, data-rich replicas bridge the physical and virtual worlds. Working in tandem with AI, they let brands design, test and refine spaces, experiences and stories.

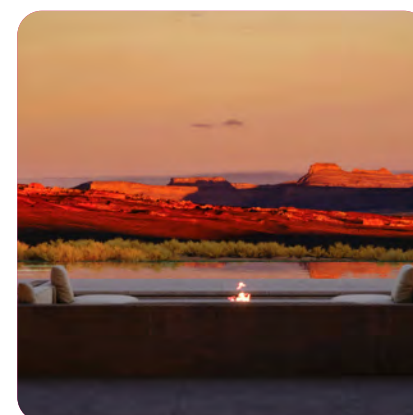
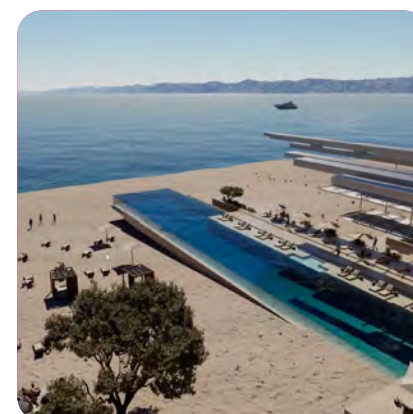


1. Immersive discovery

Digital twins can transform static websites into real-time, exploratory storytelling – letting guests experience and emotionally connect with a destination before arrival, or even before construction is complete.

2. Hybrid content creation

They also enable new modes of production, generating high-quality visuals and campaigns for advertising, social media and digital platforms – reducing the need for physical shoots while keeping content authentic and immersive.



3. Collaborative design and master-planning

By providing a shared virtual environment for architects, operators and designers, digital twins help identify friction points early, reducing delays, costs and design misalignments.

4. AI-optimised simulation

When paired with AI, they can simulate complex guest flows and behavioural scenarios, allowing brands to predict the impact of design choices on experience, safety and efficiency before build-out.

5. Intelligent operations

Once open, live digital twins enable predictive maintenance and real-time monitoring – allowing swift, data-driven responses and continuous optimisation of guest comfort and energy use.

6. Predictive engagement and loyalty

By linking CRM data to digital ‘customer twins’, hospitality brands can anticipate guest needs, tailor concierge services and strengthen loyalty through hyper-personalised engagement over time.

CONCLUSION

Throughout this report, we have explored how AI is only just beginning to future-proof the guest journey – from scaling personalisation to creating seamless experiences and supporting richer human interaction. What connects these advances is the use of AI to really deepen service and connection.

For Construct London’s Fendley, the opportunity is an intimate one. ‘Hospitality has an unfair advantage compared to other sectors. It gets to know you intimately when you stay. So, predicting service needs and making proactive suggestions is very powerful.’ In other words, the data and systems only matter if they genuinely help brands and staff to better understand and care for guests.

‘The best-case-scenario luxury hospitality is where my relationship with my hotel of choice has become so cemented that I’m carrying them around with me wherever I go’

Chris Sanderson, co-founder, The Future Laboratory

This marks the start of a shift from reactive service to anticipatory service. ‘Luxury is when you don’t have to ask,’ explains Metajive’s Benton. ‘That’s where AI can make the invisible parts of service feel effortless.’ When systems understand guest context and brand tone, they can help staff act before a request is made, creating moments of ease and recognition that feel genuinely personal.

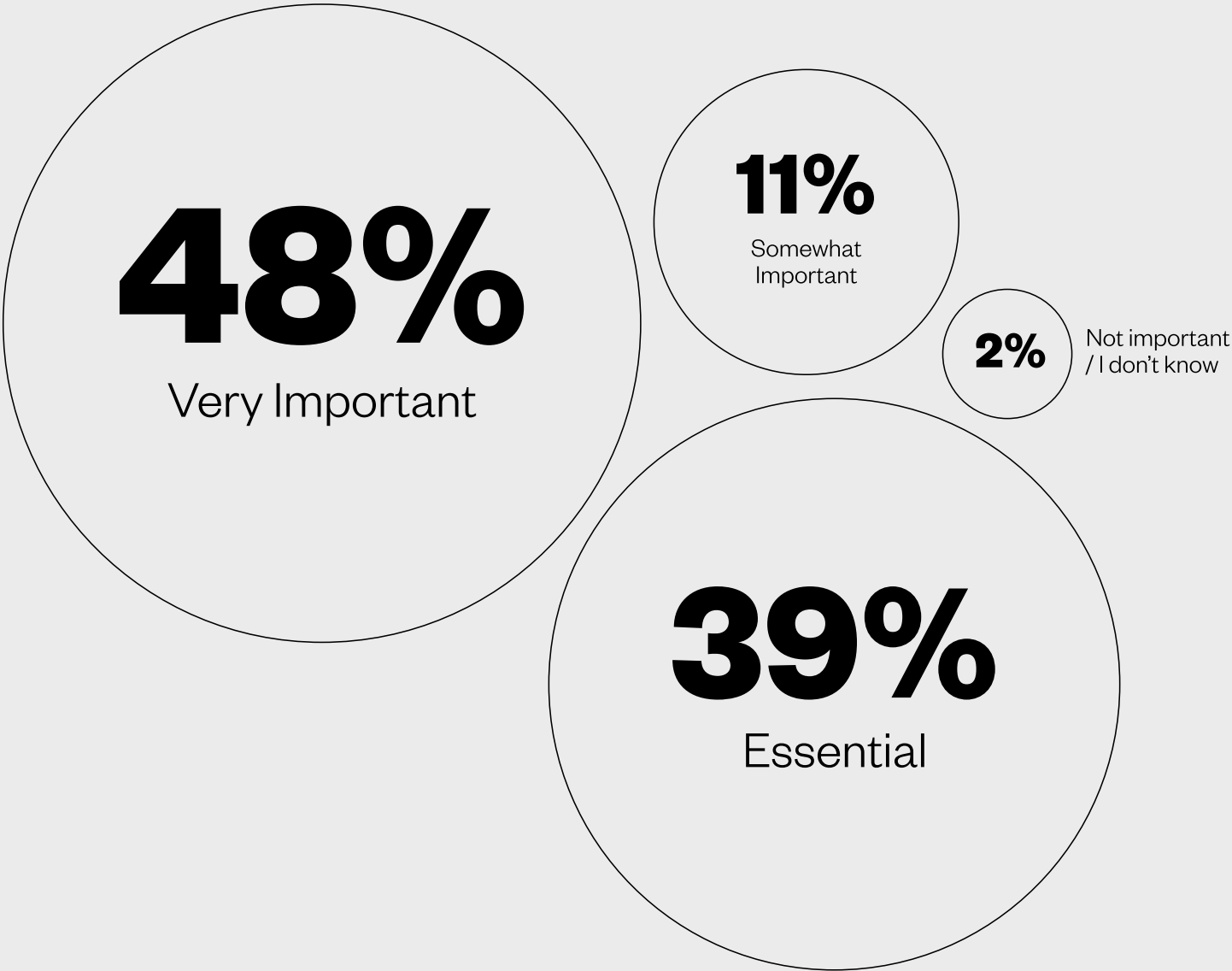
Looking ahead, this anticipatory model will move beyond the stay itself. ‘The best-case-scenario luxury hospitality is where my relationship with my hotel of choice has become so cemented that I’m carrying them around with me wherever I go,’ says The Future Laboratory’s Sanderson. ‘They are starting conversations with me about my next holiday before I do. And it’s that 365-day cycle that I would expect an intelligent hotel brand to be owning in the next 10 years.’

In practice, this could mean hotel brands evolving into ongoing wellness or lifestyle partners – curating experiences, treatments and services throughout the year – whether on location or remotely – to become part of guests’ every day.

As this horizon expands, hospitality’s playbook for anticipatory, AI-enabled service offers lessons far beyond the sector itself. If mastered in hospitality, innovation here could boost capabilities across luxury at large – from fashion and beauty to property and automotive. The same principles can help every sector evolve from transaction to experience, and from experience to relationship.

Future:Poll™

How important do you think AI-enabled services will be to luxury hotels in the next five years?





Key Takeaways

AI will be a driver of anticipatory service

Hospitality is shifting from reactive to proactive experiences, where AI enables staff and systems to anticipate guests' needs before they arise

Intelligent systems will deepen human connection

Technology's real value lies in enhancing empathy and understanding using data to create genuine care and personalised moments, not just efficiency

Hospitality will be the blueprint for luxury innovation

AI-driven models point to a broader transformation across luxury industries – from one-off transactions to continuous, relationship-based engagement

New Codes ofLuxury

Series Overview



New Codes of Luxury in Saudi Arabia

Our inaugural report decodes the Saudi luxury market’s transformation, and unveils the cultural and consumer shifts shaping a future-forward, heritage-rooted luxury landscape in KSA.

[Learn more](#)



Longevity and Wellbeing Strategies

Exploring the convergence of beauty, health and hospitality, this report defines a new paradigm: Transformational Luxury, and spotlights wellness as a valuable driver of brand relevance.

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Immersive Technologies for Transformation

This edition investigates how immersive technologies like digital twins are reshaping property, placemaking, retail and experiential marketing, ushering in an era of connected and tech-powered luxury.

[Learn more](#)



Elevating the Hospitality Guest Experience with AI

With AI transforming guests’ expectations and service delivery, this report reveals how luxury hospitality brands can re-imagine excellence and innovation for a new generation of global travellers.

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