



BUILDING AN INTELLIGENCE ADVANTAGE IN TRAVEL

- A practical guide for travel brands to act smarter and faster in today's always-on economy

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Executive Letter

Moving at the Speed of Culture

The pace of travel today mirrors the pace of life — relentless, reactive, and deeply human. An influencer's viral post can reroute demand to a new destination overnight. A small delay can ripple across continents. A new AI-enabled platform can reset what travelers expect by next quarter. In this kinetic landscape, the question isn't whether change will come. It's whether your organization can think, decide, and act as quickly as your customers do.

What's shifting isn't just where people go but how they decide. Consumers' desires are being reprogrammed in real time by culture, technology, and emotion. Expectations no longer track business cycles; they follow moments. That means leaders can't rely on static strategies to meet dynamic needs.

At PwC, we see this as both a disrupting force and an extraordinary opportunity. To keep pace with travelers who move at the speed of culture, brands should build their intelligence advantage — systems that learn continuously, teams empowered to act with empathy and speed, and operations tuned for constant adaptation.

This guide, developed with Skift, offers a practical path forward: how to redefine premium around purpose, personalize loyalty as a living relationship, and orchestrate technology with the human touch. The future of travel belongs to those who move smarter — and stay curious enough to never stop learning from their customers. <



> **Ali Furman**

PwC U.S. Consumer Markets Leader



> **Jonathan Kletzel**

PwC Sales, Service, and Marketing
Practice Leader



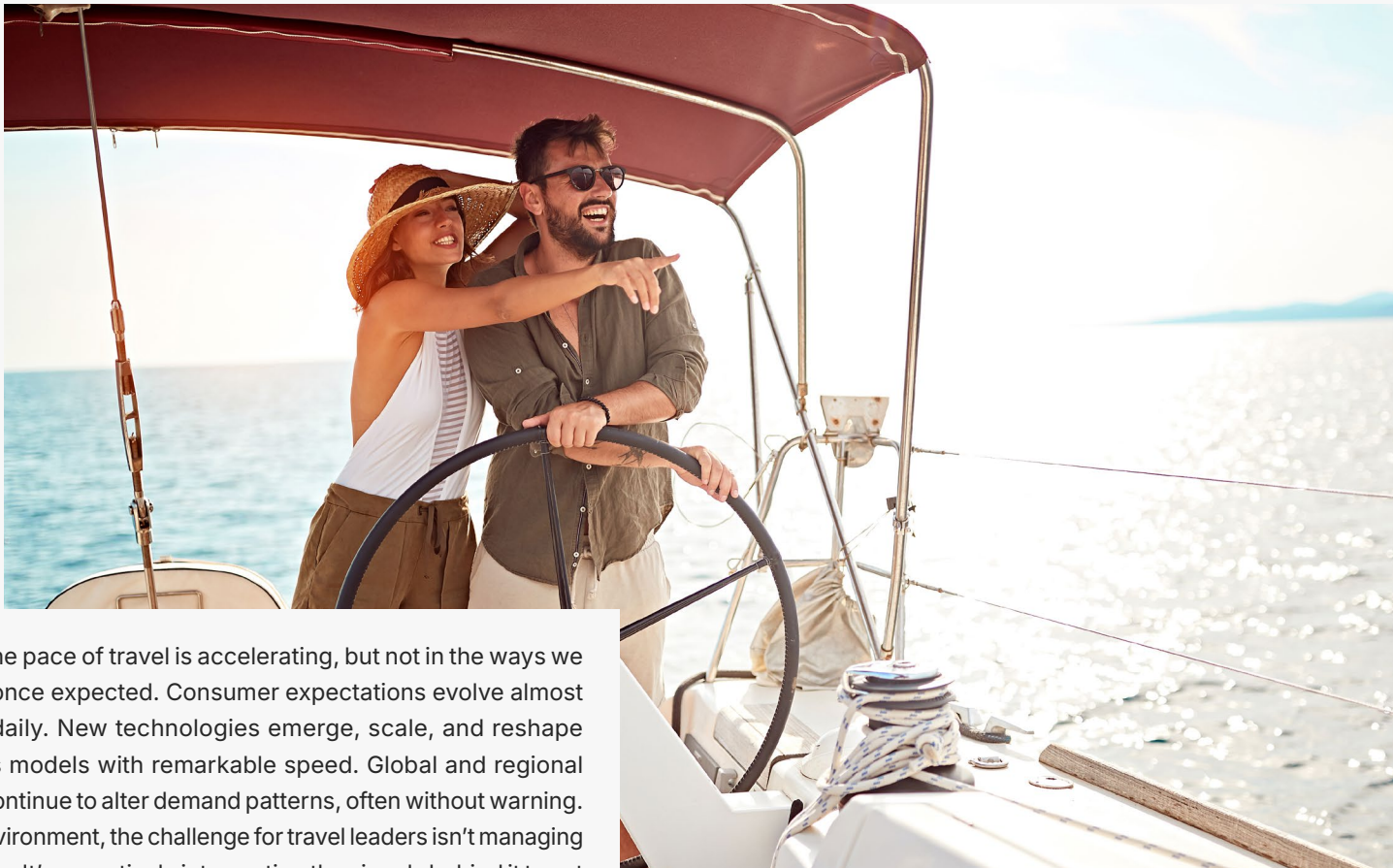
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Introduction: Steering Into Change



The pace of travel is accelerating, but not in the ways we once expected. Consumer expectations evolve almost daily. New technologies emerge, scale, and reshape business models with remarkable speed. Global and regional events continue to alter demand patterns, often without warning. In this environment, the challenge for travel leaders isn't managing disruption. It's proactively interpreting the signals behind it to act with clarity and purpose.

For airlines, hospitality groups, and other travel brands, there's no longer an off-season. Guest engagement, operational demands, and service delivery now run on a continuous cycle of adjustment and reinvention. The brands that thrive aren't those that simply adapt. They anticipate, experiment, and evolve ahead of the people they serve.

Even amid economic uncertainty, demand remains remarkably resilient. According to [Skift Research](#), 45% of U.S. consumers expect to increase their travel spending over the next 12 months. That enduring appetite keeps pressure on brands to stay responsive, establishing consistency, personalization, and value every day of the year.

Agility has become a key advantage. Companies that thrive are those that cultivate curiosity, invest in real-time intelligence, and empower teams to respond decisively. Progress now depends on a willingness to experiment, evolve, and continuously reimagine what great travel experiences can be.

This report is designed as a practical guide to that journey. Developed in collaboration with PwC's industry specialists, it brings together four key insights shaping travel in 2025 and beyond, offering concrete ways for brands to remain resilient, reinvent their offerings, and capture growth opportunities as they emerge.

The goal is to equip travel leaders with the insights they need to navigate change confidently and convert volatility into lasting progress. <

Redefine Premium for an Era of High Expectations

SKIFT TAKE

Premium travel is evolving beyond white linens and welcome cocktails. Today, travelers pay more when value is clear — when an experience saves time, reduces friction, or delivers something unexpectedly personal.

Despite economic headwinds and geopolitical uncertainty, premium travel brands continue to hold pricing power among affluent consumers even as mass-market demand softens. That resilience reflects a deeper shift in what travelers consider worth paying for. Across the travel sector, the new measure of premium is empathy: understanding who your guests are, anticipating their needs, and making life simpler in ways that feel personal.

As Jeanelle Johnson, a partner at PwC, put it, “The direction of premiumization is understanding behaviors and meeting needs before the guest even knows they have them.”

This section unpacks how traveler expectations are redefining what “premium” means. For airlines, it’s about connecting the journey to the destination. For hotels, it’s about designing for the in-between moments that define a stay. And across the industry, credible sustainability is emerging as a mark of discernment rather than virtue signaling. We also examine the rise of last-minute bookings and their implications for revenue, staffing, and service orchestration.

“ The direction of premiumization is understanding behaviors and meeting needs before the guest even knows they have them. ”

— JEANELLE JOHNSON, PARTNER, PwC

61%

of travelers would pay more for 24/7 customer service, a sign that ease and responsiveness may be the new markers of premium in today's market.

Source: Skift and Allianz



AIRLINES

Deliver Effortless Travel

Premium air travel is no longer just about who boards first or gets the bigger seat. It's also about eliminating pain points from the journey entirely, whether that means bypassing the check-in counter, receiving real-time updates during the trip, or being offered tailored upgrades like seat changes, free Wi-Fi, or lounge enhancements when they're most relevant.

"Effortless, friction-free experiences are the new premium," said Eric Shea, a principal at PwC specializing in digital strategy and customer experience. "Travel is increasingly expected to be easy, proactive, anticipatory, and personalized — and that means harnessing technology and AI to simplify every touchpoint, from booking to boarding."

The same expectation is also reflected in spending behavior. Research from [Skift and Allianz](#) shows that 61% of travelers would pay more for 24/7 customer service — clear evidence that responsiveness and ease are now core to perceived value. AI agents will be essential to scaling that level of service, delivering continuous support while enabling a smooth handoff to human experts when complexity arises.



HOSPITALITY

Design for the In-Between Moments

Premium hospitality is shifting from opulence to an emphasis on intuitive service. "It's no longer one size fits all," Johnson said. "High-end guests want things tailored to their needs, which makes it challenging. How do you create scale when everyone wants something personalized?"

Hotels are rethinking their three core touchpoints — pre-arrival, on-property, and post-departure — while focusing more deliberately on what happens between them. A late arrival, a family stay, or an unplanned meeting are moments that test a brand's ability to respond with relevance and care. "The hard part is identifying what you can do between pre-arrival and check-in to truly set your brand apart," Johnson said.

Forward-thinking brands are using this window to build anticipation and trust: by sending concierge videos with dining or activity recommendations, confirming room preferences with personalized notes, or sharing timely insights about the weather or local events. "All of these touchpoints can transform the waiting time before a trip into a moment of care and connection," Johnson said.

To deliver that level of customer intimacy at scale, hotels need intelligent systems behind the scenes. According to [Skift Research](#), nearly eight in 10 hotel executives already report measurable business benefits from AI investments, with most focusing on guest-facing tools such as mobile check-in, digital concierges, and personalized communications. These technologies enable brands to anticipate needs, personalize outreach, and build loyalty before guests even arrive.

“Travel is increasingly expected to be easy, proactive, anticipatory, and personalized — and that means harnessing technology and AI to simplify every touchpoint, from booking to boarding.”

— ERIC SHEA, PRINCIPAL, PwC

EXPERIENCE

Highlight Authentic Sustainability

For many affluent travelers, sustainability has become part of what makes something feel truly premium. "But it's not just about being eco-friendly," Shea said. "It's also about knowing where the product came from, how it was made, and telling a great story. That narrative creates a sense of luxury."

Surveys frequently underscore this sentiment. According to PwC's 2025 Voice of the Consumer survey, 44% of consumers say they are willing to pay more to support environmental sustainability in food production. Skift Research echoes a similar willingness in the travel space: In a recent survey, around half of U.S. travelers said they would pay \$30 to \$100 more for sustainable travel options, and one-third were willing to spend even more.

But there's often a gap between intent and action. When small fees appear at checkout, participation in sustainable options drops sharply — showing that value should feel both credible and built in. Sustainability is no longer an upsell but a defining feature of product design. Whether it's local stone at a resort, coral regeneration by a cruise line, or local guide partnerships, the most effective efforts make sustainability seamless — part of the premium journey itself.

And while this value spans generations, younger consumers are driving much of the momentum. Gen Z and millennials, for instance, are far more likely to prioritize brands with visible commitments to sustainability and social impact — a trend explored further in PwC's Holiday Outlook Trends.

“ But it’s not just about being eco-friendly. It’s also about knowing where the product came from, how it was made, and telling a great story. That narrative creates a sense of luxury. ”

ERIC SHEA, PRINCIPAL, PwC

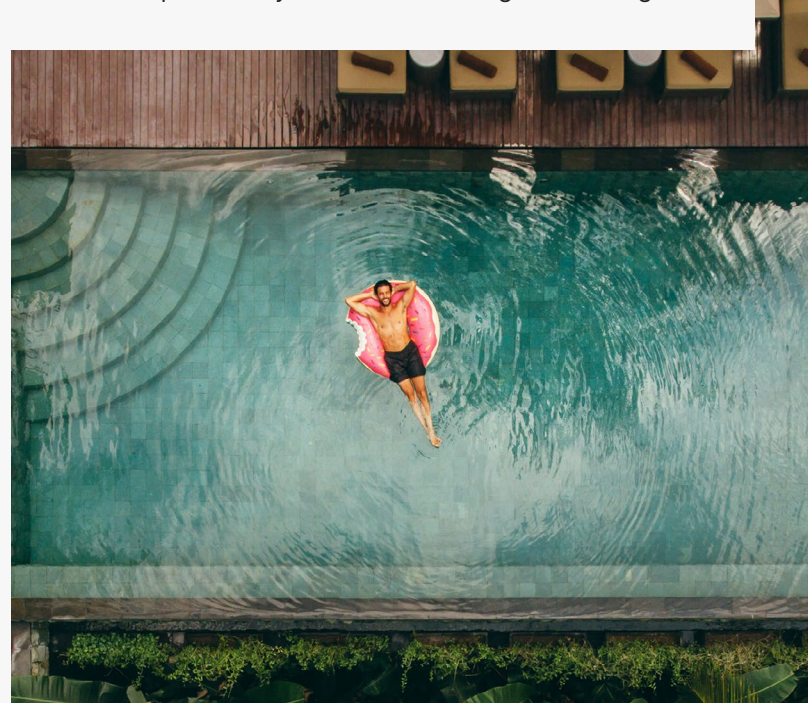
SERVICE

Adapt to the Last-Minute Mindset

Booking windows are shrinking across all segments of travel, but in luxury, the stakes are higher. Affluent travelers are booking closer to departure — often within days — while continuing to look for highly personalized, well-executed experiences. In 2025, nearly 30% of bookings at Leading Hotels of the World were made within two weeks of travel, according to the brand, signaling a clear compression of planning timelines.

Travel Age West reports that Onefinestay, the high-end hospitality brand, is seeing booking windows shorten, with more luxury clients planning trips just weeks before departure, even for popular holiday periods. Wealthier travelers may feel freer to book last-minute because they aren't as constrained by cost sensitivity or limited options. They also lean on advisors or concierge services to secure access even close to departure.

Spontaneous booking behavior creates volatility that can strain pricing, staffing, and inventory management. To counter this, leading brands are turning to predictive analytics and AI-powered tools. PwC's work with Wyndham Hotels & Resorts shows how agentic AI can transform operational responsiveness — using real-time data to anticipate guest needs, balance workloads, and maintain profitability even when booking windows tighten.



› QUICK WINS

1 Create Synthetic Guest Profiles

Use generative AI to create synthetic guest profiles (e.g., luxury solo traveler, wellness-seeking family) and simulate how they interact with your brand — from booking to checkout. "It's almost like a digital twin, but from a customer perspective," Johnson said. These AI personas can help identify service gaps and personalization opportunities without relying on real guest feedback.

ACTION

- ➔ Build a handful of AI-generated traveler personas.
- ➔ Map their journeys and test key moments.
- ➔ Flag friction points and design adjustments.

2 Coach for Personalization

Train your staff to deliver elevated, tailored service. "Coaching your front-line team to deliver a more personalized, elevated experience can significantly improve the guest journey," Johnson said. "It doesn't require a massive investment — just good management and accountability."

ACTION

- ➔ Implement short-term coaching and upskilling tailored to trip types and guest profiles.
- ➔ Role-play situational scenarios to help staff adapt to guest context.
- ➔ Reinforce performance with feedback loops and accountability.

3 Use Smart Tools to Empower Staff

Leverage tech-enabled tools to help teams build authentic one-to-one connections with guests. "Clienteling apps give staff portable access to guest data and preferences in real time," Johnson said. "That kind of personalized service can have a huge impact." Shea agreed: "Surface the right content or conversation at the right time — that's how you turn a transaction into a relationship."

ACTION

- ➔ Build simple guest profiles from existing stay and booking history.
- ➔ Make that data accessible to guest-facing teams in real time.
- ➔ Train staff to act on signals: Why are they traveling? What do they need today?



Personalize Loyalty Along the Journey

SKIFT TAKE

Loyalty is no longer about earning points but about earning preference. As travelers seek access, ease, and recognition, loyalty programs are evolving into living ecosystems that reward behavior not just in the moment, but also in context.

Customer loyalty is built on more than transactions. It reflects advocacy, with brands acting in the traveler's best interest through experiences that feel consistent, intuitive, and genuinely human. Amid current economic uncertainty, travelers are also viewing loyalty through a practical lens, seeking clear value as much as emotional recognition. Personalization, in turn, is evolving from isolated touchpoints into a continuous journey that unites technology, service, and storytelling.

This evolution is also paving the way for agentic commerce, a future in which AI-powered travel assistants act on behalf of travelers, earning loyalty by anticipating needs and rewarding brands that deliver value seamlessly across contexts.

"Loyalty has to flip," said John Rolston, customer transformation and loyalty principal at PwC. "Brands should cultivate reciprocal loyalty — showing loyalty first by anticipating customer needs and offering value before they ask, with the aim of earning loyalty in return." Increasingly, that value is expressed through experience rather than points accumulation, with early or exclusive access, priority upgrades, dedicated service lines, or private spaces designed to help travelers feel recognized in real time. However, recognition alone isn't enough — loyalty is proven when brands demonstrate an understanding of the traveler's context, not just their profile.

Recent findings from [Skift Research](#) reinforce this shift. When travelers choose to book outside their loyalty programs, it's rarely about flashy offers — it's about what fits the trip. The top reasons include better flight schedules or hotel locations (31%) and loyalty perks that don't match the trip's needs (25%), while price ranks lower at 21%. Meanwhile, [PwC's research](#) highlights a perception gap between what brands believe growth in customer loyalty to be (89%) versus what customer believe it to be (39%). As economic pressures mount, price sensitivity could grow, making it more important for brands to demonstrate the tangible value of loyalty.

1 in 4

travelers book outside their loyalty programs because the perks don't fit their trip, showing that loyalty should adapt to real travel contexts.

Source: [Skift Research](#)

"Ease of earning and redeeming points"

are among the top reasons travelers join loyalty programs, surpassing brand loyalty and aspirational goals.

Source: [Skift Research](#)



AIRLINES

Reward Loyalty on the Traveler’s Terms

Airline loyalty is shifting beyond points and perks toward a more fluid and personalized approach. “What many premium travelers want isn’t points,” Rolston said. “They want access, they want seamless, they want proactive.” That shift is urgent: according to [PwC’s 2025 Customer Experience Survey](#), 46% of executives believe their loyalty programs will be irrelevant within three years, and 57% say their current systems aren’t delivering the outcomes they need.

Programs like [Alaska Airlines’ new Atmos Rewards](#) — which lets members choose how they earn, whether by miles flown, dollars spent, or segments — embody this evolution toward “loyalty your way.” Similarly, [Etihad Guest](#) now allows elite members to select custom benefits — such as lounge access, extra baggage, or chauffeur service — from a menu each year, further shifting the loyalty paradigm toward personalization.

“Where airlines need to go is knowing who you are and communicating with experiences and benefits that reflect your preferences — not just giving everyone the same benefits,” said Jonathan Kletzel, sales, service, and marketing practice leader at PwC.

“What customers really respond to is relevance,” said Luc Bondar, chief operating officer and president of United Airlines MileagePlus. “Loyalty is earned when we show we understand what matters to you, not just your tier status. That’s when it feels less like a program and more like a relationship.”

“Where airlines need to go is knowing who you are and communicating with offers that reflect your preferences — not just giving everyone the same benefits.”

— JONATHAN KLETZEL, SALES, SERVICE, AND MARKETING PRACTICE LEADER, PwC

The next phase is about moments, not tiers. Emerging models of “micro-loyalties” — context-aware gestures that create immediate value, like a timely lounge pass or the ability to choose your own reward — reflect the growing demand for real-time, personalized engagement. AI will be key to powering this shift, detecting intent, anticipating needs, and triggering the right reward options at the right moment.

“Choice adds a feeling of ownership over destiny,” said Alexander Stillman, managing director at PwC, underscoring why flexible, emotionally resonant interactions can help build stronger loyalty. Airlines that embrace this human-centered flexibility may help transform loyalty from a transactional program into a living relationship defined by empathy, choice, and connection.

> Q&A: BUILDING BRAND PREFERENCE THROUGH TRUST

Luc Bondar, COO and President, United Airlines MileagePlus

SkiftX: How is loyalty evolving in the travel industry?

Luc Bondar: The model used to be pretty simple: fly a certain distance, earn rewards. But travelers today expect something more dynamic. They want to be recognized, understood, even surprised — not at one point in the journey, but across all of it. That includes when someone’s dreaming about travel, planning it, on the day of travel, at their destination, and even once they return. Every one of these moments is a chance to enrich the experience in a personalized way.

With AI agents on the rise, is there still room for loyalty to influence decisions?

Absolutely. An AI agent might find the cheapest flight, but it’s the human who steps onto the plane. They’re the one experiencing the product, interacting with the crew, deciding whether that felt seamless or stressful. Loyalty doesn’t disappear. It just shifts. It’s about being the brand travelers prefer because they trust you’ll get it right, every time.

HOSPITALITY

Prioritize Emotional Bonds Over Rewards

In hospitality, loyalty is shifting from transactional incentives to relationships built on empathy, ease of use, and intelligent responsiveness powered by agentic systems. "Guests want to feel seen, and to know that their loyalty means more than a number in a system," Rolston said.

That expectation is rising fast. According to PwC's 2025 Customer Experience Survey, 70% of executives report that customer expectations are evolving faster than they can adapt, placing pressure on hospitality brands to deliver experiences that feel personal and proactive.

For Kletzel, that emotional dimension is now central to retention. "The half-life of a bad experience is three times longer than that of a good one," he noted — a reminder that loyalty isn't just earned through perks but preserved through recovery, empathy, and timing.

Rolston pointed to hospitality's unique opportunity to design around the guest's mindset. "If I'm there for work, don't bother me, but if I'm with family, I may want a higher-touch experience," he explained. "Nurturing that relationship on a human level can completely change my view of the brand."

True loyalty, then, is not about accumulation but anticipation — knowing when to engage and when to give space. Brands that humanize these touchpoints can turn loyalty programs into genuine relationships, helping travelers feel recognized and understood rather than simply rewarded.

“The half-life of a bad experience is three times longer than that of a good one.”

JONATHAN KLETZEL, SALES, SERVICE, AND MARKETING PRACTICE LEADER, PwC

What does personalization actually look like in that journey?

Let me give you an example. For more than 40 years, our in-flight magazine featured a column called Three Perfect Days, a curated guide to how you might spend 72 hours in a city. We've now made that digital and scalable, with content that reflects the full network of United destinations. But where this is going next is what excites me: imagine your version of Three Perfect Days, tailored to how you travel, who you're traveling with, and what you love to do. That's not just content. That's connection.

“PwC has helped us think through the future — particularly in areas where storytelling, technology, and travel converge. There's real value in their ability to flex between strategic thinking and operational depth.”

What gives you energy in this moment of change?

I think this is a remarkable time. Agent-driven commerce, new data partnerships, personalized media — they're all converging. But that convergence only works if the customer trusts the brand behind it. That trust is the runway. If we get that right, we're not just competing on price or schedule — we're building something much stickier, more meaningful, and more enduring.



LOYALTY DESIGN

Make Your Program Intuitive

Loyalty programs function better when they are simple and intuitive. "I don't think the average consumer understands the value of their loyalty program," Rolston said. "Many programs are too complicated, and people don't have time to learn all the rules and restrictions."

That sentiment echoes findings from [Skift Research's State of Travel 2025 report](#). Travelers prioritize loyalty programs that are easy to navigate and offer immediate value. A majority now rank simplicity and transparency as more important than the number of points earned or the size of rewards. Many also expressed frustration with confusing rules, unclear redemption thresholds, and inconsistent communication.

In a price-sensitive climate, clarity equals confidence. Showing how loyalty translates directly into savings builds trust and repeat use. For Kletzel, simplicity signals respect. "When you make loyalty effortless, you're showing the traveler that you value their attention as much as their spend," he said. "The more seamless the experience, the stronger the bond."

Many of today's most successful programs focus on clarity and consistency over complexity. They reduce friction by presenting choices travelers can understand instantly, whether that means dynamic offers based on trip type, faster redemptions, or the ability to select preferred benefits.

As Rolston put it, "Loyalty has to feel like part of the journey, not a separate portal. If travelers have to ask how it works, you've already lost them."

LOYALTY ENGAGEMENT

Borrow From Other Models

Travel loyalty programs are increasingly borrowing from fintech, retail, and subscription models to remain relevant in a rapidly evolving market. According to Stillman, innovations such as embedded payments, co-branded debit cards, and "pay with points" features are blurring the lines between travel and financial services. "We're also seeing micro-investing mechanics, like round-up cash top-ups, being used to help travelers complete itineraries," he said. "These models create more touchpoints and emotional engagement beyond traditional earn and burn."

Stillman added that brands are also experimenting with gamification, dynamic earning, and bundled perks. "Think streaks, badges, or lifestyle tie-ins like streaming or wellness credits," he noted. "Paid loyalty tiers and subscription-based benefits not only guarantee perks like Wi-Fi or lounge access but also provide predictable revenue for brands."

One example comes from Wyndham Hotels & Resorts, which recently launched Wyndham Insider, a paid subscription offered to eligible rewards members. "We want to make travel feel elevated, without making it expensive," said Scott Strickland, chief commercial officer at Wyndham. "For \$95 a year, you get concierge access, a free night's worth of points, and discounts across your entire trip, not only on hotels, but also on flights, car rentals, and concerts, for example."

Wyndham's approach highlights how loyalty is evolving toward flexibility and perceived value. The same thinking is reshaping financial partnerships, with credit card ecosystems emerging as new hubs for earning and redemption. As these partnerships deepen, travelers are responding. According to [Skift Research](#), nearly half of U.S. travelers now own a travel credit card, and 60% prefer bank-branded cards that allow them to earn and redeem rewards across multiple brands rather than being tied to a single airline or hotel. Many credit card travel platforms have rapidly become major players in online booking, demonstrating how finance-driven loyalty models are redefining what "membership" means in the travel industry. <



QUICK WINS

1 Let Travelers Choose Their Perks

Give members control. Flexible benefit selection adds perceived value without added complexity. "When you reach a certain status, some airlines let you pick your reward — from upgrades to gifting status to others," Kletzel noted. "It's a step toward personalization, even if it's not fully one-to-one yet."

ACTION

- ➔ Give tiered members personalized reward options when they reach key milestones.
- ➔ Use past behavior to pre-select the most likely preferred option.
- ➔ Position it as "Loyalty Your Way" to encourage emotional engagement.

2 Refresh Without a Rebuild

Keeping loyalty programs relevant doesn't require starting from scratch. Stillman advised brands to "focus on freshness" — introducing small, timely updates that show the program is alive and aware. Agentic AI is transforming travel discovery and search, reshaping what loyalty means and demanding a deeper understanding of customer behavior to drive true differentiation.

ACTION

- ➔ Rotate timely perks or partners on your app or email channels.
- ➔ Test AI-driven triggers that adapt benefits to a traveler's location or recent activity.
- ➔ Integrate customer and loyalty APIs with LLMs to surface personalized, context-aware offers.

3 Know the Trip, Not Just the Traveler

Tailor loyalty touchpoints to context. "Personalization isn't just about who the traveler is — it's about why they're traveling," Rolston said. "I might want a high-touch experience on a leisure trip, but zero interaction when traveling for work." Even basic occasion-tagging can shift the tone of engagement.

ACTION

- ➔ Use booking metadata to infer trip type (e.g., solo vs. family, business vs. leisure).
- ➔ Create light-touch personalization scripts for key moments (check-in, departure, return).
- ➔ Build a complete customer view by combining first-, second-, and third-party data, including privacy-compliant data sharing with partners.



Orchestrate Tech and Human Touch

SKIFT TAKE

Travelers tend to favor brands that deliver a seamless omnichannel journey — one that bridges digital and human touchpoints to handle transactions effortlessly, anticipating needs with personalized care when it matters most.

Travelers today expect their journeys to be smooth and self-directed, from checking in on their phones to receiving instant updates along the way. What began as convenience has become an expectation. A [recent report from Skift and Oracle](#) found strong year-over-year growth in mobile check-in and self-service adoption, indicating the growing importance of these tools to guest satisfaction.

As technology assumes more predictive and operational tasks, the human role becomes even more crucial. The next stage of progress lies in what many call agentic collaboration — where digital and human agents work together fluidly to anticipate needs and deliver care. [Skift Research](#) highlights that 61% of travel marketers already use AI for customer journey mapping, underscoring how automation is increasingly paired with human insight to enhance responsiveness and empathy.

This section examines how many travel brands are striking that balance by using technology for efficiency, enhancing human connection, aligning culture and data, and scaling orchestration across markets.

66%

of companies using AI agents report higher productivity.

Source: [PwC's 2025 AI Agent Survey](#)



ORCHESTRATION

Design the System: Balance Efficiency and Empathy

Travelers expect brands to know when speed matters and when empathy is more important. Orchestration is about system design — deciding where automation serves most effectively and where the human touch adds value. It focuses on mapping journeys, classifying tasks, and confirming handoffs feel seamless to the traveler.

John Swadener, a principal at PwC, described how his team helps clients decide which moments belong to each side: “We start by mapping the emotional intensity and cognitive complexity of each customer touchpoint.” Routine, high-volume tasks like appointment scheduling or order-status checks can be automated, he said, while those that “require empathy, negotiation, or judgment” should stay human.

“Some of those interactions are really just about providing information,” said Darin Yug, global hospitality leader at PwC. “That’s where automation makes sense.” But he also sees the human element as essential when staff can add warmth or insight: “When a guest checks in, knowing whether they’ve made their reservations or what they plan to do during their stay — that human element of listening and responding — that’s where I see the biggest opportunity.”

According to [PwC’s 2025 AI Agent Survey](#), 66% of companies using AI agents report higher productivity, and more than half say customer experience has improved. Yet the technology works better when paired with context-aware staff who step in seamlessly when emotion or judgment is required.

Wyndham Hotels & Resorts offers a clear example of that orchestration in practice. Working with PwC, the brand introduced Guest360 — an AI-powered contact center platform built on Salesforce that connects guest data, preferences, and interactions across channels in real time. Since implementing Guest360 and related tools like Wyndham Connect Plus, the company has achieved a 20% reduction in contact center expenses, 10% higher conversion rates, and a 20% drop in average handle time.

Thoughtful orchestration depends on people who know how to use it well. As automation takes over routine tasks, frontline roles increasingly rely on judgment, empathy, and awareness. Yug noted that service excellence often comes down to “listening and reacting,” especially when small interactions can make a big impact.

› Q&A: MAKING EVERY INTERACTION FEEL PERSONAL

Scott Strickland, COO, Wyndham Hotels & Resorts
Michael Mahar, Head of Commercial Technology, Loyalty & Digital Products, Wyndham Hotels & Resorts

SkiftX: How do you bring human touch and technology together at scale?

Scott Strickland: We don’t assume one channel fits all. Some guests want to text. Some want to talk. Some want to use an app and never look up. So we meet them where they are, and we use technology to make each interaction smarter. At the front desk, our platform prompts the associate with your loyalty status and preferences. It ensures the recognition is real. You feel seen, not just checked in.

Michael Mahar: Our goal is to add more value to our franchisees by reducing non-value work from front desk staff, so they can focus on in-person service and hospitality. Our tools give them more information so they can have a more meaningful interaction with the guest.

How does AI show up in those moments?

Strickland: It’s increasingly embedded, but never intrusive. You might be messaging with Wyndham Connect, our large language model, to change your reservation or ask for towels. We’re now layering in personalization so those interactions get even better: faster answers, more relevance, less repetition. The guest doesn’t need to understand the infrastructure. They just feel that it works.



“ PwC brought the vision and integration skills we needed to make AI work in the real world — not just with virtual agents, but by augmenting our call center staff with intelligent tools that surface the right action at the right moment. ”

Mahar: AI helps clear the operational bottlenecks that used to tie up our contact centers and front-desk teams. It handles the simple, repetitive tasks in the background so our teams can focus on the interactions that actually make a stay feel personal.

What’s your approach to agentic commerce and LLM-based search?

Strickland: We know travelers are already starting to plan their trips with AI tools. So we’re actively testing integrations that let large language models pull in our availability, rates, and content directly. Whether the guest completes the booking in the LLM or gets handed off to our site, the point is: we’re there. It’s another orchestration opportunity for us to connect new discovery channels with the operational stack behind the scenes.

Mahar: Some models will refer guests back to our branded platforms. Others will allow full transactions right inside the LLM. We’re using model context protocol to push live inventory, pricing, and content into those system — and we’ll have multiple partners live soon. This isn’t just about new marketing. It’s a new kind of distribution, and we’re building the infrastructure to be ready.

AUGMENTATION

Empower the Individual: AI as Copilot, Not Replacement

If orchestration is about designing the system, augmentation is about equipping the people within it. Across travel and hospitality, AI is emerging as a valuable copilot that enhances, rather than replaces, frontline talent. Intelligent assistants provide the right data, context, and confidence in the moment, freeing staff to deliver authentic, human-centered service.

Swadener pointed to “real-time copilots” that help contact-center agents with tone, compliance, and next-best-action prompts, as well as tools that let sales teams surface personalized offers from CRM data. “In all cases,” he explained, “the outcome is confidence and capacity, not redundancy.”

Yug sees similar potential at hotel front desks. “When a guest walks up to the front desk, you already know when they last stayed and any past service issues, so you can address those items right away,” he said. With the right information at hand, staff can turn routine check-ins into meaningful conversations.

PwC’s 2025 AI Jobs Barometer found that roles requiring AI skills earn a 56% wage premium compared to others, demonstrating the market’s value of human-AI fluency and reflecting how organizations increasingly view technology as a force multiplier for human capacity. Far from displacing people, AI is enhancing their contributions.

That perspective is shared by leaders like Ravi Simhambhatla, chief digital and innovation officer at Avis, who is rethinking how automation supports frontline talent. “When you take the drudgery off someone’s plate, you unlock their capacity for better work,” he said. “Our goal is to use automation to simplify what can be automated, so our people can focus on what truly requires judgment, empathy, and expertise.”

Q&A: BUILDING THE FUTURE OF SEAMLESS MOBILITY

Ravi Simhambhatla, Chief Digital and Innovation Officer, Avis

SkiftX: What’s your vision for agentic commerce in the car rental space?

Ravi Simhambhatla: There’s a generation of travelers who start their search using AI, not a search page. If that’s where discovery happens, companies need to be there — not just advertising, but fulfilling the offer and owning the relationship. That’s what orchestration means: being present at every digital touchpoint and confirming the handoff to real-world service is seamless.

How does this show up in the physical experience?

It’s about being anticipated and recognized. When you layer that with future capabilities like autonomous vehicles and drones, you start to see how orchestration makes service almost invisible — but deeply personal. That’s the future we want to thrive in.

Where’s the biggest opportunity to scale this orchestration next?

The next leap is connecting the digital and physical across the entire ecosystem. That means making sure all of the data from your booking, your preferences, and your past trips is in sync and available at every touchpoint. When that happens, service becomes truly responsive. You don’t have to repeat yourself. The message is clear. It just works.



ALIGNMENT

Build the Backbone: Data, Governance, and Culture

Every orchestrated experience rests on clean data and shared purpose — yet many organizations still overlook these fundamentals. As PwC’s Jonathan Kletzel noted, companies often focus on quick fixes instead of strengthening their foundation. “People are trying to make existing processes more efficient with technology instead of rethinking the process model completely,” he said. “If you do that, you’ll just automate a bad digital process into a slightly less bad one.”

Yug was clear about where companies should begin: “Getting the data right is the first priority.” He warned that information about properties or services often becomes inconsistent across systems. “That’s not a quick win, but it should be a priority,” he said. “Organizations need to fix the data and have some common data standards so it’s easier for these tools to search against it.”

Swadener observed that most failures in orchestration come from people and processes, not technology. “Most stumble on cultural and governance alignment,” he said. “Technology integration issues are solvable with investment. Cultural adoption lags when teams don’t share KPIs or ownership of the customer journey.”

PwC’s 2025 AI Agent Survey found that 88% of executives are increasing AI budgets, yet nearly half admit they have not redesigned workflows to support those tools. PwC’s 2025 AI Jobs Barometer shows that roles exposed to AI are evolving 66% faster than others, meaning governance and training should keep pace accordingly.

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— JOHN SWADENER, PARTNER, PwC

EXPANSION

Scale Orchestration Across Brands and Borders

As AI pilots prove their worth, leaders face a tougher challenge: extending success across markets without losing coherence or care. Travel companies with multiple brands or geographies require structures that enable innovation to scale while respecting local nuances.

Swadener recommended a two-tier model: “Establish a central orchestration layer or unit for data, design patterns, and governance,” he said, “and use federated execution, where local teams adapt global blueprints to cultural and regulatory nuances.” This approach keeps brand consistency while empowering regional teams to personalize experiences.

Scaling also demands new capabilities in training and oversight. Staff everywhere need to learn how to interpret AI insights, refine prompts, and coach models with feedback. Systems should be API-first so information can travel easily between booking, loyalty, and on-property platforms. And an AI orchestration council can help monitor ethics, model performance, and customer sentiment.

PwC’s 2025 AI Agent Survey found that only about one-third of companies have widely scaled AI agents, although nearly 90% plan to increase their investment. Travel brands that standardize orchestration patterns now may be better positioned to scale when others are still in the pilot phase. <

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— JOHN SWADENER, PARTNER PwC



› QUICK WINS

1 Automate What's Routine, Humanize What's Not

Free your people to do what tech can't. "Start with time-sink, low-empathy processes," said Swadener. "The goal is to reclaim 15 to 30% of staff time for relationship-building and complex problem-solving." Automating routine tasks can create space for meaningful, human moments.

ACTION

- ➔ Identify repetitive, low-value workflows (FAQs, order tracking, account updates).
- ➔ Automate internal tasks like knowledge search, case summarization, and CRM updates.
- ➔ Reinvest saved time in higher-touch interactions — resolving issues faster, listening more closely, and deepening customer trust.

2 Rethink the Process, Not Just the Tool

Don't automate inefficiency. "Too many companies buy new AI tools without a real plan for how to use them," Kletzel said. "They make a bad digital process slightly better instead of rethinking it entirely." The goal isn't faster clicks — it's smarter workflows that support improved customer and employee experiences.

ACTION

- ➔ Map current workflows and flag those inherited from legacy systems.
- ➔ Redesign first, then apply automation — not the other way around.
- ➔ Use pilot tests or "synthetic customers" to simulate behavior and assess improvements before launch.

3 Don't Build What You Can Borrow

Stop trying to out-engineer trillion-dollar tech companies. "Before you go build something yourself, go see if somebody else has already done it," Kletzel said. "It might save you some time." Rather than investing in bespoke AI tools that quickly become outdated, brands can partner with established platforms and focus their resources on what truly differentiates them — content, experience, and trust.

ACTION

- ➔ Evaluate whether a third-party solution already meets 80% of your needs.
- ➔ Invest your build budget in proprietary data, creative UX, or brand-defining features.
- ➔ Form partnerships with established LLM providers for scale, security, and updates.



Be Ready for Disruption

SKIFT TAKE

In a world of constant shocks — from weather to workforce to geopolitics — resilient travel brands respond with clarity, speed, and coordination. Agility has become a defining advantage for those who adapt, rebuild, and move forward with purpose.

Weather, infrastructure strain, and geopolitical instability are now part of daily operations. Yet in a competitive environment where demand is uneven and growth margins are tight, disruption also presents opportunity. As PwC's Jonathan Kletzel observed, "Anyone who thinks they're going to avoid a crisis is deluded. You can prepare for the top ten things that might happen, and there's always going to be an eleventh." A differentiator is preparedness — knowing what can break, how to recover, and how to turn volatility into progress.

Many executives are now actively repositioning their companies for disruption — 58% say they are seeking other C-suite views and encouraging deeper internal debate, while 50% report bringing in external voices to challenge strategy and assumptions. By embedding this kind of openness and reflexivity into their decision-making, organizations are turning uncertainty into a catalyst for stronger alignment and faster adaptation.

"A lot of my clients were tested through the pandemic," said PwC's Darin Yug. "They adjusted, they got through, and they came out better equipped for it. Other disruptions don't intimidate them anymore."

From airlines reengineering dispatch networks to hotel groups testing recovery protocols, travel companies are redefining resilience as a key performance metric. This section explores how leaders in aviation, hospitality, technology, and workforce strategy can prepare for disruption with speed, precision, and confidence.

58%

of executives are seeking alternative C-suite perspectives and encouraging deeper internal debate, showing how leaders are preparing for disruption.

Source: [PwC Pulse Survey](#)



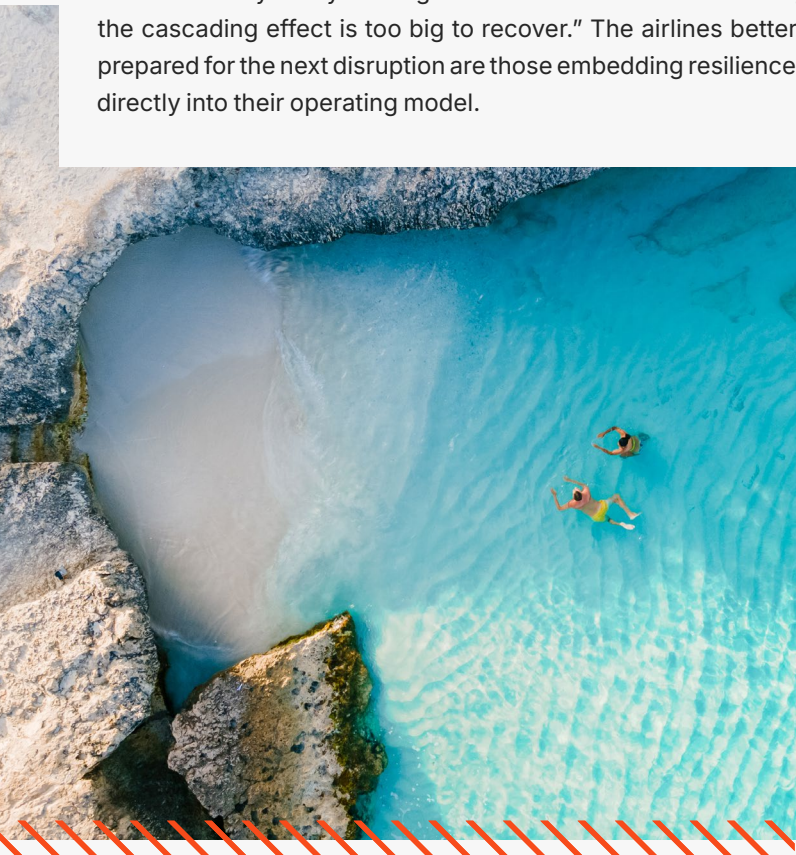
AIRLINES

Scenario Planning Takes Flight

For airlines, disruption has become an expected part of operations, making preparation and rapid response more important than ever. Between severe weather, IT outages, and supply-chain constraints, aviation leaders are rethinking preparedness from the inside out. PwC's Operational Resilience Framework emphasizes that agility begins with understanding "what can break" and building a tested plan to recover systems, people, and processes in parallel.

Many carriers are now creating resilience playbooks that combine predictive analytics with operational war-gaming, mapping out supplier dependencies, crew dispatch redundancies, and communication protocols. PwC's Managing Risks from Geopolitical Crises outlines scenario simulations and cross-functional control rooms that allow faster decision-making and coordination during crises.

Kletzel said the stakes are high for organizations operating at scale: "When your systems go down for even fifteen minutes, the cascading effect is too big to recover." The airlines better prepared for the next disruption are those embedding resilience directly into their operating model.



HOSPITALITY

Forecasting the Unpredictable

In hospitality, disruption often takes the form of rapid demand swings — sudden surges, sharp drop-offs, and unpredictable traveler behavior. Skift Research observes that while global travel demand remains resilient, growth is increasingly "uneven and volatile," with short-term spikes and pullbacks creating new challenges for forecasting and resource allocation.

PwC's Hospitality and Leisure Deals Outlook highlights that dealmaking now favors companies that can quickly pivot strategy, reallocate capital, and scale digital capabilities. It also suggests using "M&A as an active strategy to reshape the brand portfolio for resilience."

Yug pointed out that a stronger forecasting advantage comes from expanding the lens beyond bookings data: "The most forward-looking hotel groups are listening outside the organization — tracking weather, events, and even social signals to predict shifts before they hit."

Hotel brands are also rethinking how they balance people and automation. According to PwC's Workforce Radar, many companies are redesigning roles to make staffing more flexible and adaptable. At the same time, leaders are confronting a disconnect between how prepared they believe their teams are and how employees actually feel. To close that gap, boards are increasingly focusing on modernization of technology systems that enable AI-driven planning and stronger operational resilience.

For hospitality businesses, success depends less on perfect forecasting and more on the ability to respond swiftly and effectively to shifting conditions.

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DARIN YUG, GLOBAL HOSPITALITY LEADER, PwC

TECHNOLOGY

Modernize the Core to Unlock Agility

Technology can be both a source of disruption and the foundation for resilience. PwC's Operational Resilience Framework emphasizes that modernization, not incremental fixes, is essential to agility: Organizations may need to redesign technology environments to recover quickly, reduce interdependencies, and enable continuity under stress.

Many travel companies remain limited by legacy systems. Yug observed, "Boards are asking, 'Why aren't we doing more with AI?' The answer often comes down to outdated platforms that can't support modern data integration."

PwC's 2025 Digital Trends in Operations Survey found that 57% of operations and supply-chain leaders have integrated AI into selected functions or across their organizations, while 92% say technology investments haven't yet delivered the results they expect.

Kletzel cautioned that as digital ecosystems expand, complexity itself becomes a risk. "New technologies are emerging just as quickly as the tools meant to manage them," he said. "With so many systems and partners in play, the landscape has become increasingly fragmented and complex." The most future-ready systems focus on simplicity, standardization, and interoperability, creating a stronger foundation for resilience.

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— JONATHAN KLETZEL, SALES, SERVICE, AND MARKETING PRACTICE LEADER, PwC



WORKFORCE

Train for Flexibility

Workforce adaptability has become an important measure of organizational strength. PwC's Workforce Radar shows that business and HR leaders are confident in their talent strategies, yet employees express lower confidence in their organizations' ability to adapt quickly — a disconnect that highlights the need for stronger alignment.

Resilience begins with readiness. Travel companies are focusing on developing "elastic talent networks" that allow people to move fluidly across functions as demand shifts. PwC has suggested that organizations consider establishing clearly defined response roles that can be activated globally.

Yug believes the experience of the past few years created a more capable leadership class: "This generation of leaders has lived through the hardest disruptions and learned how to make tough decisions fast." A continuing priority is to embed that agility into the company culture, not just contingency plans. ◀

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› QUICK WINS

1 Build Resilience Before You Need It

Plan for the outage you can't predict. "You're not going to avoid a crisis," Kletzel said. "You need a plan to recover fast — systems, people, and communication." From airline disruptions to cyber incidents, the brands that tend to be more resilient aren't the ones that avoid failure, but those that rebound transparently and decisively.

ACTION

- ➔ *Identify critical failure points across operations.*
- ➔ *Establish recovery playbooks and clear communication protocols.*
- ➔ *Train staff to manage customer expectations with transparent updates.*

2 Listen Beyond the Walls

Forecasting no longer stops at bookings. "What's new now is listening outside the organization versus just inside the walls," Yug said. "You have to make sense of external signals — weather, events, influencers — and feed them back into your planning."

ACTION

- ➔ *Include social, environmental, and market signals in forecasting.*
- ➔ *Integrate external data streams into demand planning and staffing models.*
- ➔ *Use AI-driven monitoring tools to track sentiment shifts.*

3 Modernize for Momentum

Legacy systems limit speed. "Boards are asking why they're not doing more with AI," Yug said. "The truth is, many organizations' infrastructure isn't equipped for it. They need modern platforms that serve up the right data and respond fast."

ACTION

- ➔ *Audit existing tech stacks for bottlenecks that hinder agility.*
- ➔ *Align modernization with clear business outcomes.*
- ➔ *Prioritize interoperability for seamless communication in a crisis.*

Lead With Intelligence

The next era of travel will belong to brands that lead and act with intelligence — not just data intelligence but human and organizational intelligence. Those who sense change early, connect insights across teams, and translate signals into action may be better positioned to outpace competitors still reacting after the fact.

Building an intelligence advantage means reimagining how travel organizations learn, decide, and deliver. It involves redefining premium as purposeful, making loyalty personal and adaptive, seamlessly orchestrating technology and human care, and preparing for disruption as a matter of design, not defense.

Across the travel landscape, the most resilient leaders share a mindset rooted in curiosity, courage, and clarity of purpose. They view volatility as a proving ground for innovation, not a setback. They combine empathy with analytics, human intuition with machine precision, and global consistency with local nuance.

Travel has always been about movement — across borders, ideas, and expectations. In a world reshaped by technology and uncertainty, the future belongs to brands that lead with both intellect and heart. Those who listen closely, act decisively, and keep learning from every journey will redefine what it means to move the world forward. <



Connect with PwC specialists to explore how your organization can leverage these insights to help accelerate growth, deepen connections, and shape the future of travel.

About Skift

Skift is the largest industry intelligence platform, providing media, insights, and marketing to key sectors in travel. Through news, research, conferences, exclusive interviews, strategic sector-focused newsletters, and more, Skift deciphers and defines the global trends that matter to the marketers, strategists, and technologists shaping the industry.

SkiftX is Skift's in-house content marketing studio, working collaboratively with partners like Accor, Abu Dhabi's Department of Culture and Tourism, AWS, Expedia, Allianz Partners, and many more to help brands solve problems, create unforgettable moments, and communicate big ideas through content, research, and event activations.

Visit skift.com/work-with-us to learn more or email skiftx@skift.com.

About PwC

Our purpose — to build trust in society and solve important problems — is at the core of everything we do. It guides how we serve our clients, our people and the world. To help our clients build trust and deliver sustained outcomes, PwC provides professional services across Audit and Assurance, Advisory and Tax. We bring a range of capabilities to help organizations solve faster, achieve more and realize greater value so you can drive to the leading edge. These capabilities include technology and business transformation, deals, sustainability, cybersecurity and regulatory, governance/boards, risk and much more. Across our global network of more than 364,000 people in 136 countries, we're committed to bringing you the latest solutions to your biggest challenges.

