journey

Stay for the story

How hotels can unlock Return on Experience

WHITEPAPER

“Guests no longer buy rooms. They buy *stories, moments, and meaning*”

Introduction

Welcome to *Stay for the story: How hotels can unlock Return on Experience*, a report designed to inspire hoteliers to reimagine their property as a holistic, experiential ecosystem, rather than a passive collection of departments and incremental add-ons.

WHITEPAPER

We invite you to consider how guests no longer buy rooms: they buy stories, moments, and meaning. Using internal data and real-life examples, this report outlines emerging travel trends, and steps that luxury hotels in particular can take to transition from selling ‘heads in beds’ to the total guest experience, capitalising on these trends along the way.

This data-backed whitepaper also explores how structured experience programming increases total guest spend per stay, improves marketing efficiency, and shifts hotels into a higher-value position in the travel decision set.

Return on Experience

Return on Investment (RoI) has traditionally defined hotel performance, focusing on the asset and its yield. In the experience economy, however, competitive advantage increasingly comes from how a property curates, connects and retails the moments that surround the stay.

The experience economy has reshaped luxury travel, and we uncover some of the ways different elements across a property can be monetised together. In other words, how hotels can decipher the new guest economy, unlocking Return on Experience (RoX) using integrated experience retailing.

Through our work with more than 750 luxury hotels and spa properties, we've been able to reveal the extra (and sometimes unexpected) benefits that emerge from this type of retailing too, touching upon aspects like loyalty and marketing - and of course revenue.

Moving mindsets

Our mission at Journey is to help hoteliers change their mindset to selling a stay, designing a holistic experience for guests, monetising every moment and delivering more connected experiences.

Ultimately, this whitepaper's goal is to help hoteliers think both creatively and commercially. We hope you find it useful, but above all inspiring, to set you on the right path.

"As hospitality expands into wellness, residences, mobility, and retail, the strongest brands will create connected worlds that run on loyalty and emotional relevance, rather than relying solely on room revenue."[1]

SOURCE: Skift. (2025). Connected Journeys: Hospitality Becomes an Always-On Relationship. Skift Research.

CHAPTER ONE

A Changing World

The Rise of Experiential Luxury

The world may be in a state of geopolitical flux, but one thing is certain: people still travel. Global travel continued its upward trajectory in 2025, with total gross bookings projected to reach $1.67 trillion[2], according to research from Phocuswright.

This extends the industry's recovery beyond pre-pandemic benchmarks. One of the prime drivers is luxury travel, in a variety of forms: from wellness, transformation and restorative travel, to "connection-driven" travel involving families and groups.

Experience-led positioning is already widespread in luxury and competitive pressure is high. The opportunity lies in competing more effectively within a mature experience market.

It's no surprise to see some of the world's largest hotel chains pivot to premium, with Accor leading the charge in Europe and extending its footprint. Camil Yazbeck, Global Chief Development Officer at Accor, has said the group's premium brands represent a high-growth segment within the global hospitality landscape.

Luxury hotel demand has reached 'insatiable' levels globally. High-end properties are experiencing unprecedented occupancy rates and daily revenue growth as affluent travelers seek premium experiences.

"Accor is considering spinning off Ennismore because lifestyle hotels generate 3x the fees of traditional properties, mostly from non-room revenue."

Vineeth Purushothaman
Director of White Sky Hospitality & Founder of HotelLadder.com

"Global spending on luxury hospitality is projected to reach $370bn in 2028."[3]

SOURCE: McKinsey, 2025

A chance to disconnect

As technology becomes ever more pervasive - and exhausting - hotels are stepping in to help guests disconnect through wellness-focused experiences.

The Swiss Hotel Management School defines wellness tourism as travel combined with activities that enhance physical, mental, and emotional wellbeing[4].

> “The wellness market has been growing 35% since 2019 (6.2% annually) and is forecast to expand even faster (7.6% yearly) through 2029.”[10]
>
> SOURCE: Global Wellness Institute

Mandarin Oriental’s Tech-Life Integration work, for example, encourages guests to reflect on their relationship with technology, introducing simple boundaries to support rest and recovery. Across its hotels it offers device-free wind-down rituals, mindful breathing, and discreet sensory cues to help guests reset overstimulated senses and improve sleep quality.

Longevity - encompassing health optimisation, life extension, and holistic wellbeing - is another growing focus. As Conde Nast Traveller reports, it is among the top wellness trends for 2026, particularly for business or bleisure travellers looking to maintain their health goals on the road and combat jet-lag. Increasingly, this longevity-led approach is also being complemented by a broader shift towards transformational wellness, where the focus extends beyond maintenance, but deeper mental reset and lasting behavioural shifts[5].

Switching back on

At the same time, some hotels are embracing technology through innovative partnerships in digital wellness. Hilton, for instance, teamed up with the Calm app to integrate meditation content into 2,400 hotels through its connected room technology[6].

Hyatt collaborates with Headspace to offer complimentary mindfulness content through the World of Hyatt app, while Marriott has partnered with Aescape to offer robotic AI-powered massage technology at its Ritz-Carlton and W properties[7].

The underlying theme is that there are a number of ways to interpret wellness; each hotel can and should apply its own formula.

Hilton X Calm

To integrate meditation content into 2,400 hotels through its connected room technology.

Hyatt X Headspace

To offer complimentary mindfulness content through the World of Hyatt app.

Marriott X Aescape

To offer robotic AI-powered massage technology at its Ritz-Carlton and W properties.

A family affair

Another area to watch in 2026 is the ongoing rise of family and multi-generational travel.

Growth is being driven not only by a desire to share costs, but to reclaim time together and create long-lasting memories between parents, children and grandparents.

For luxury hotels, milestone events like birthdays and anniversaries offer rich opportunities for extended, experience-driven stays.

Cost challenges

Despite strong travel growth, hotels face mounting structural pressures. Globally, 45% of operators report needing more employees to meet customer demand, according to the Future Today Strategy Group.

In the UK, hotels are preparing for financial strains following the Autumn Budget 2025, with rising energy prices, staffing and inflation top of mind.

The UKHospitality organisation predicts a 76% increase in business rates for accommodation businesses. “We have a situation where hospitality businesses are checking their wage bills and rateable values, and their hearts are sinking at the eye-watering increases before them,”[8] said Kate Nicholls, Chair of UKHospitality, in a response to the November Budget announcement.

Combined with OTA commissions, these pressures reinforce the need for hotels to diversify beyond room revenue and grow new profit streams.

At Journey, we’re seeing firsthand how quickly the hospitality model is shifting from accommodation-centric to experience-centric.

Operators reported needing more employees to meet customer demand:

45%

SOURCE: Future Today Strategy Group’s 2025 Tech Trend Report

Accor’s research of 7,500 consumers across six countries revealed that wellness is a priority for:

79%

SOURCE: Making Waves: Rethinking Spa and Wellness Design for a Modern Era 2025

TAKEAWAYS

Three Chapter Takeaways

1.

Global travel now surpasses pre-pandemic levels, driven by luxury guests seeking wellness, connection, and immersive experiences.

2.

Wellness has expanded to include digital detox, longevity, and mindful tech, reshaping how luxury hotels deliver wellbeing.

3.

Staffing shortages, inflation, and rising costs are part of the reason why hotels are shifting from room revenue to experiences.

“*Wellness* has evolved from a trend into a core pillar of *luxury* hospitality and design”

Camille Lopeo, VP, Emblems & The Purist. Head of Regional Marketing and Wellness for Sofitel, MGallery & Emblems.

“Making Waves: Rethinking Spa and Wellness Design for a Modern Era”

By 2030 *1 in 3 travellers* will book a hotel purely for its wellness offering

SOURCE: Global Wellness Institute, 2025

CHAPTER TWO

Welcome To The New Guest Economy

In this chapter, we explore how evolving guest expectations create new opportunities for hotels, and why adopting a retailing mindset makes strong financial sense.

As covered in our *Beyond the Room: Retailing experiences to drive hotel profitability* whitepaper, hotels have a broad range of ancillaries they can monetise at the time of booking.

These include dining, spa, activities, golf, and champagne on arrival, as well as less common options like pet charges or co-working — both of which present meaningful revenue potential.

A growing trend in hospitality is how it is increasingly becoming companion-inclusive. As guest expectations evolve, hotels are extending their retailing mindset beyond the individual traveller to those travelling with them, including pets. Elevated amenities, calming in-room touches and thoughtful routines are emerging as monetisable experience layers that respond to emotional comfort, turning what was once a policy cost into a source of guest value and incremental revenue.

Co-working is similarly evolving from a supporting amenity to a meaningful revenue stream. When integrated into the guest journey rather than treated as a standalone add-on, co-working spaces can generate substantial income alongside rooms and food and beverage, while anchoring hotels more deeply in guests' daily routines and local communities. For example, at The Hoxton in Southwark, part of Accor's Ennismore division, 40% of revenue comes from rooms, 30% from food and beverage, and the remaining share from co-working[11].

Monetise *every* moment.

As travellers increasingly seek personalised itineraries and “micro-moments,” mass programming is losing appeal. Guests now look for curated, meaningful experiences — especially those they can personalise — which opens clear potential for retailing. When experiences are visible, relevant, and bookable, guests are willing to spend more.

Lessons learned from aviation:

Across travel, aviation serves as a model for ancillary revenue. Airlines excel at monetising beyond the base fare:

In 2024, per-passenger ancillary revenue rose:

2.5%

Even as fares fell:

3.8%

SOURCE: The 2025 Yearbook of Ancillary Revenue.

Total global ancillary revenue hit a record $148 billion, well above the pre-pandemic high of $109.5 billion in 2019.[13]

In the U.S., Frontier leads the pack with ancillaries comprising roughly 62% of total revenue. In Europe, Ryanair derives about 30% of its income from ancillaries and grew this channel by 10% in 2025.

Looking for *more*

Across hospitality and retail, 61% of consumers are willing to spend more for personalised experiences.

Yet only 25% of experiences are highly customised[13].

This matters because Journey's internal data shows that extras generate, on average, an additional 16% in booking revenue.

To capitalise on the new guest economy, luxury hotels must first ensure operational readiness before digitising their offer. While franchised hotels often benefit from system support, independents must assemble their own technology stacks.

Platforms like Journey connect these systems, making extras and experiences visible, relevant, and bookable.

Room revenue remains predictable but stagnant, limited by OTAs and seasonality. Experiences, by contrast, unlock higher-margin, scalable revenue streams.

Further validation comes from DataIntelo[15], which projects the global hotel ancillary revenue platform market will grow from $2.73 billion in 2024 to $7.96 billion by 2033, driven by digital adoption and integrated commercial platforms.

“Integrations are a pain to build and anything but a pleasure to uphold, but knowing what spa treatments are being purchased and activities are being requested goes a long way towards incremental improvements from the perspectives of RevPAG (per guest) and, ultimately, the reason why guests are choosing your property over all the others in a given location, and willing to pay above-market rates.”[17]

Adam Mogelonsky,
Hotel Mogel Consulting

TAKEAWAYS

Three Chapter Takeaways

1.

Hotels are shifting from selling just rooms to retailing a full guest experience — monetising dining, spas, co-working, and even pet-focused amenities to boost profitability.

2.

Visible, relevant, and bookable experiences drive guest spending, but with only 25% highly tailored today, the opportunity for tech-enabled hotels remains vast.

3.

The guest economy's growth depends on digitisation and unified platforms that connect every ancillary into a more joined-up experience that is easily bookable, enabling hotels to monetise every moment.

“We view ourselves as a travel retailer, and much like other great retail companies and e-commerce companies, we are making sure that we put all our products on the shelf and that they’re easy to find.”[16]

Drew Pinto
Executive Vice President and Chief Revenue and Technology Officer, Marriott, 2025

CHAPTER THREE

Stay For The Story

We’ve explored shifting tourism trends, the resulting market potential, and the retail opportunities modern technology enables.

Now, hotels face the challenge of designing experiences guests will remember and share. One effective approach is to position the hotel as the destination itself. More travellers now choose where to go based on where they want to stay - and that presents an opportunity.

Narrative-led stays

Hotels can transcend basic ancillaries by creating narrative-led programmes of experiences.

Examples include wellness rituals, chef-led dining moments and culinary workshops, seasonal or sensory immersions. Working with PoB Hotels recently, Journey launched marketing campaigns to drive sales across key periods such as Black Friday and Christmas.

Manor House Hotel & Spa, located in Alsager, Cheshire, positions its spa front and centre: “Who said spas have to be silent? Sip, soak, laugh, repeat — because well-being is better when it’s shared.” Its experience-first positioning drives exceptional ancillary revenue.

In Worcestershire, The Elms focuses equally on its rooms and award-winning Greenhouse Spa, drawing in website visitors to book the “full experience”.

The Lakes Hotel & Residences by YOO in the Cotswolds prominently cross-sells on its website, promoting everything from climbing and archery to teddy bear hunts and corporate events.

In fact, hotels that build programmes and itineraries based around art, nature or craft, or signature “hero” experiences unique to the hotel’s identity, enjoy multiple bookable revenue streams.

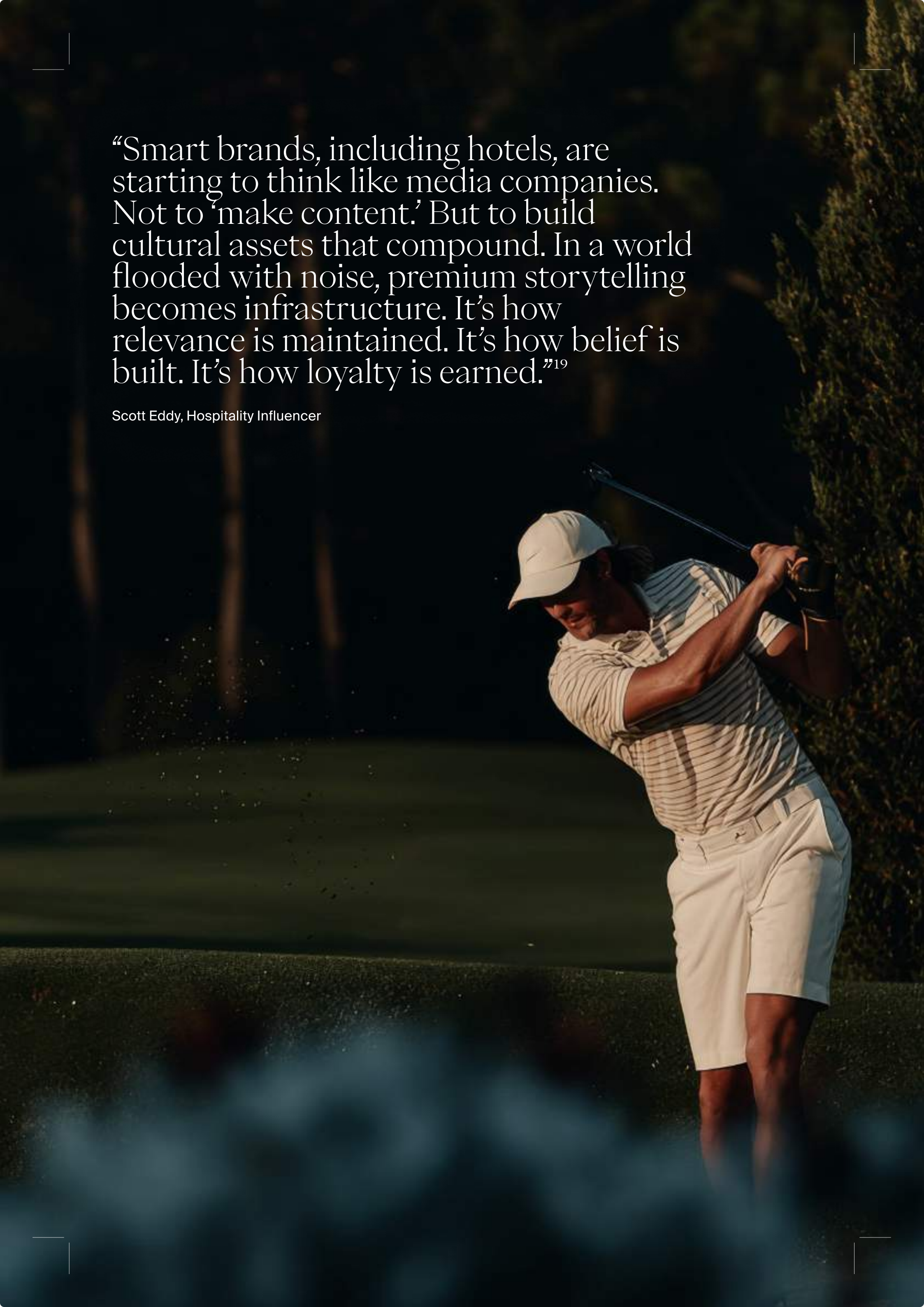
> “Today’s guests don’t choose us for convenience, they choose us for the experience. When the hotel becomes the destination, every touchpoint must earn its place. Curated itineraries and narrative-led moments are now essential to standing out.”

Ed Burrows D.L.
Co-Founder of Wildhive

45% of travellers have picked a destination based purely on accommodation.

Gen-Z 61%
Millennials 50%
Boomers 26%

SOURCE: Skyscanner Travel Trends 2026



“Smart brands, including hotels, are starting to think like media companies. Not to ‘make content.’ But to build cultural assets that compound. In a world flooded with noise, premium storytelling becomes infrastructure. It’s how relevance is maintained. It’s how belief is built. It’s how loyalty is earned.”[19]

Scott Eddy, Hospitality Influencer

When the hotel is *the destination*

While isolated add-ons have value, curated experience packages can elevate the entire stay. Thinking about the “hotel-as-destination” also means looking outward: what local partnerships can be forged? Are there nearby vineyards, artisans, galleries, or nature guides?

Could these elements shape themed or seasonal itineraries, perhaps a landmark anniversary, cultural festival, or major sporting event?

Redefining spaces is a trend we have already identified for 2026. Position your property as a lifestyle hub, not just accommodation. Use communal spaces for local pop-ups, exhibitions and social events that connect guests to culture.

We invite hotels to envision “experience circuits” that blend on and off-property moments.

Storefront mindset

More travellers are choosing to book hotel stays online and the UK is among the fastest-growing markets in this shift. Ranking third globally behind the U.S. and China, the UK saw an 8.5% year-on-year increase in online sales, reaching $65.1 billion, while offline sales grew just 0.9%, according to Phocuswright’s *Travel Forward* report[2].

When the booking journey moves online, everything needs to move with it. Translating these experiences into digital form is essential; creativity drives revenue only when it’s visible and bookable.

Tell these stories in your marketing. Use photography and video to show guests immersed in the experience, capturing authentic emotion. The result? Inventory-led, digitally connected, and beautifully merchandised.

Through our suite of offerings, Journey helps hotels unify ecommerce, marketing, and live experience management to make designed moments both commercially powerful and effortlessly bookable.

Hoteliers must think like online retailers. For most guests, the website is the shopfront and it needs to trade like one. Every room, restaurant, spa treatment and experience should be clearly described, priced and presented to sell. It should also be live and bookable in the moment: choose a table and time, select a treatment and slot, confirm instantly and pay seamlessly.

TAKEAWAYS

Three Chapter Takeaways

1.

Hotels must evolve from simple stays to narrative-led, emotionally resonant experiences that make the property itself the destination and inspire guests to share their stories.

2.

Designing curated, themed itineraries through local partnerships, such as artisans, wineries, and cultural events, turns hotels into lifestyle hubs that connect guests deeply with place and purpose.

3.

Creativity drives revenue only when experiences are visible and bookable; digital storytelling, ecommerce, and live experience management unify marketing with seamless guest engagement.

CHAPTER FOUR

The Commercial Engine of

Experiential Hospitality

Investing in stories and experiences, and retailing a complete guest journey, pays off. By monetising every moment, experience-led hotels drive measurable gains: higher average order value, increased conversion, and stronger uptake of extras such as spa, dining and activities.

Internal Journey data shows that giving users the option to select package details at the point of booking increases Average Order Value (AOV) by 95%.

Dining performs particularly well. Our data reveals that the longest stays occur at properties with one or two restaurants. Compared with those without, properties featuring restaurants see stays that are, on average, 6% longer.

It's something we refer to as Return on Experience (RoX), and it measures the total commercial impact of a fully retailable guest journey, aligned to Journey's pillars:

1. Unlock *commercial potential*
2. Drive *direct revenue*
3. Increase *guest spend*
4. Maximise the *stay*

“Return on Experience doesn't come from creativity. It comes from structure. If it can't be managed, it can't be sold. If it can't be sold, it can't be yielded. If it can't be yielded, it can't scale.”

Simon Bullingham
Founder and CEO of Journey

Non-bookable inventory

A critical part of understanding experiential hospitality’s commercial engine is recognising that hotels lose revenue whenever guests cannot book in advance.

If the restaurant isn’t pre-stay bookable, tables sit half-empty. If spa treatments require phone bookings, sales are lost after hours. And when bikes, equipment, or activities can’t be reserved for the full stay, utilisation drops.

Without a digital itinerary, guests also miss chargeable experiences or upgrades. Every offline process adds friction - and friction kills revenue. While OTAs remain viable booking channels, they offer limited personalisation. Their focus on price comparison prevents deep integration with your property, restricting an accurate retailing experience.

The multiplier effect

A robust platform creates a compounding effect. When hotels adopt Journey’s unified ecosystem — where they manage, market, and book in one place — the results multiply.

Extras represent an additional 16% in revenue at the point of booking.

SOURCE: Journey, internal data

Dynamic packaging increases Average Order Value (AOV) by 95% just by allowing guests to curate their stay at checkout.

SOURCE: Journey, internal data

The Performance Platform

Return on Experience

1. Manage

Manage powers the ecosystem by structuring every experience — it controls the people, spaces, time, and inventory that form the foundation of sellable products.

2. Market

Market activates that inventory by driving demand, using performance marketing and targeting to put the right experiences in front of the right guests.

3. Book

Book captures the transaction, turning interest into confirmed revenue through a seamless, conversion-led booking engine.

“We’ve moved away from thinking about occupancy and we’re now starting to think about the total guest experience. When stays can be curated with spa, dining, wellness, activities, before they arrive, the guest spend rises naturally because they’re really investing in the experience as a whole, not just a room.”

John Pette
Managing Director of Fairlawns Hotel & Spa

On average, properties with rooms and a spa see a 44% increase in Average Order Value (AOV)

SOURCE: Journey, internal data

Selling complementary services at time of booking is a powerful revenue driver. In 2025, Journey's internal data shows a total of 10,411 room orders, which generated £4.4 million revenue for hotel customers. Of these, there were 9,238 table bookings and 2,322 spa package bookings, demonstrating clear multi-product behaviour.

When spa is the entering product, guests frequently add rooms and vice-versa, proving that cross-selling is natural when friction is removed.

Boosting lifetime value

Repeat stays and long-term loyalty follows as well. This drives higher marketing efficiency, improving Return On Ad Spend (ROAS) and lowering Customer Acquisition Cost (CAC). For instance, based on Journey's data, ROAS jumps from 13 to 30 when the spa is bookable online.

Looking at Journey's data, more memorable experiences dramatically increase repeat bookings, as well as higher spend. At Seaham Hall Coastal Spa Resort, in Durham, and Manor House Hotel & Spa, repeat guests spend nearly twice as much compared to single-order guests.

Non-guest appeal

Experiential retailing isn't limited to guests. Extending experiences to non-guests opens new revenue channels. As Journey has discussed before, spa memberships are emerging as a significant trend in the wellness and hospitality industries, driven by a growing societal desire for self-care, relaxation and holistic well-being.

Capturing pre-arrival revenue also boosts operational predictability, allowing hotels to deliver their best performance.

Overall, hotels should tap into their communities, seasons, and creativity. Experiential hospitality is the new standard of luxury and the strongest commercial engine available to hotels.

In 2025:

10,411 room orders generated £4.4 million revenue.

Of these, there were 9,238 table bookings and 2,322 spa package bookings, demonstrating clear multi-product behaviour.

Rooms and spa bookings alone increase Average Order Value (AOV) by 44% (from £371 to £534).

Repeat guests spend 1.5 to 2× more than single-order guests.

> “There’s a risk to not incorporating wellness amenities to varying degrees, especially for hotel brands that have a need to differentiate themselves in order to command above-market rates.”[21]

TAKEAWAYS

Three Chapter Takeaways

1.

Experience-rich hotels that monetise every guest moment achieve higher revenue, stronger brand attachment, and increased average order value by aligning each stay with Return on Experience (RoX).

2.

Digitally retailing a full journey (from rooms to restaurants and spas) increases Average Order Value, reduces friction, and maximises operational efficiency.

3.

Beyond guests, experiential hospitality opens new revenue channels by engaging locals through memberships, events, and community initiatives, making experience the true driver of modern hotel profitability.

SUMMARY

The Path To Experiential Excellence

As we've outlined throughout *Stay for the Story: How hotels can unlock Return on Experience,* hotels are now at a critical juncture. They must evolve from selling stays to shaping seamless, experience-led journeys.

As travel demand surpasses pre-pandemic levels, the next step for hoteliers is to think carefully about how best to design, package and retail every aspect of the guest experience.

Wellness has become a luxury essential, so hotels should embed holistic wellbeing into their offerings. Partnerships with local artisans, wellness brands, and cultural institutions can position properties as destinations in themselves, anchoring loyalty through emotional storytelling.

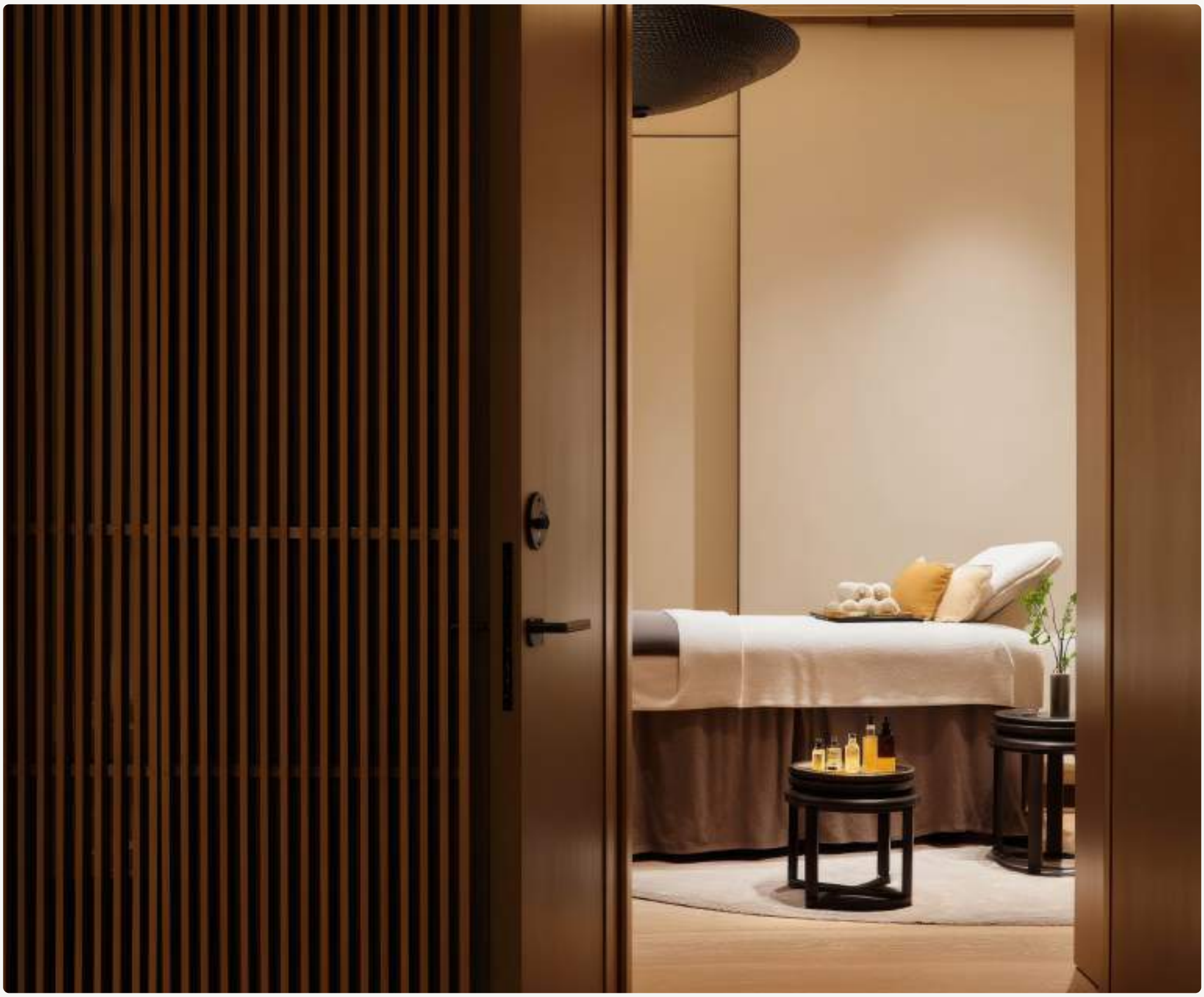
Personalisation needs to mature beyond basic upselling, not least because guests increasingly expect to able to curate meaningful moments that align with their values and interests.

As with most modern business practice today, digitisation is the foundation. Hotels need connected systems that make all experiences, from dining, spa and activities to co-working or pet amenities, visible and bookable online.

It's not easy. Hospitality leaders are under pressure, with operational costs soaring, but they should invest in training their teams to retail experiences like retailers do products, tracking uptake and optimising for Average Order Value (AOV) and Return on Experience (RoX).

Finally, hotels must unify their marketing, ecommerce, and operations under data-led platforms to monetise every moment of the stay.

At Journey, we're proud to partner with hundreds of hotels, who used our performance platform to successfully turn their creativity into measurable commercial growth.



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