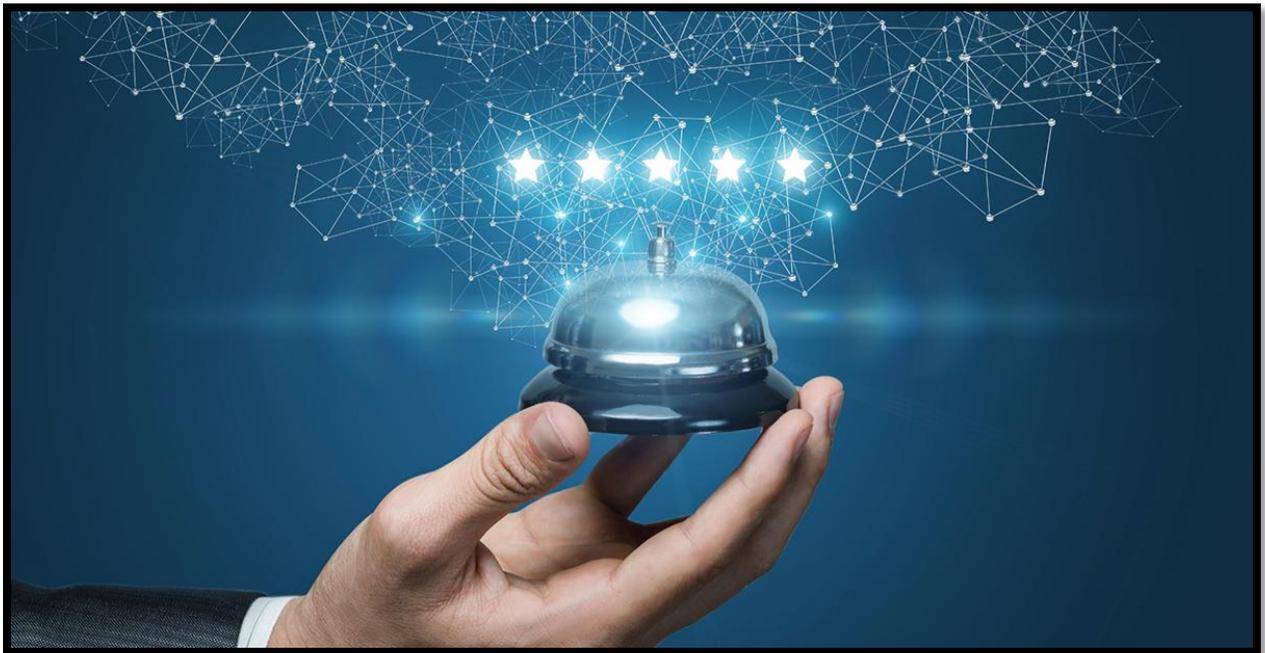


Inside The Minds of CEOs and The Three Pressures Shaping the Global Hospitality's Future

As the hospitality industry navigates the final quarter of 2025, global executives are increasingly focused on the three pivotal trends shaping tomorrow's hotel landscape: the rapid proliferation of brands, mounting labour challenges, and the ripple effects of tariffs and trade uncertainty. These forces are seemingly redefining how operators, investors, and even talent leaders position themselves for the years ahead.



At Renard International, where we have spent over five decades connecting hospitality organisations with global talent, these themes mirror the shifts we've observed across the world—from North America and Europe to Asia and the Middle East. The conversations unfolding among hotel CEOs today highlight not only the industry's resilience but also its urgent need for adaptability.

In major U.S. markets such as Los Angeles, San Francisco, and New York, hotel workers are organising for higher wages and improved working conditions, which has signalled a broader global labour movement within hospitality. Cities like Los Angeles have already enacted landmark wage increases, setting a precedent that other regions may soon follow. This trend isn't entirely new, as Europe has historically maintained lower staffing levels due to the very generous employee benefits, contrasting with practices in the Americas and the Middle East.

This shift poses both opportunities and challenges for hoteliers. On one hand, higher wages can attract and retain much-needed talent amid persistent labor shortages. On the other, rising payroll costs demand more strategic workforce planning and tighter operational efficiency.

We've seen increasing demand for HR and labour relations professionals who can balance employee well-being with long-term profitability. The ability to foster an empowered, motivated workforce will become a defining factor for success in 2026 and beyond.

Over the past year, major hotel groups have continued expanding their brand portfolios, with some launching multiple new concepts within just a few months. As of January 2024, there were over 1,200 hotel brands globally—likely approaching or surpassing 1,300 today. While this diversification is intended to cater to a wide range of guest preferences, many industry leaders argue that the rapid proliferation of brands is creating confusion for both consumers and investors.

In markets where differentiation is becoming harder to sustain, brand storytelling and authenticity are emerging as key competitive advantages. Guests are no longer satisfied with “standardised luxury;” they are drawn to experiences that align with personal identity and cultural values.

For developers and owners, this means completely re-evaluating brand partnerships. Aligning with the right brand is *not* about volume; it's about vision, purpose, and long-term positioning in a market that increasingly prizes uniqueness over uniformity.

Additionally, tariff pressure around the world driven by the current USA administration have added another layer of complexity to hotel development and operations. With the cost of building materials, furnishings, and imported goods rising unpredictably, hoteliers everywhere face mounting uncertainty in planning and budgeting.

Beyond immediate financial implications, this instability highlights the increasing importance of agile procurement strategies and diversified supply chains. Executives must now think globally but act locally, as well as sourcing sustainable, regionally made products whenever possible to safeguard against trade disruptions.

While many U.S. markets have experienced modest revenue declines in 2025 due to policy shifts under the current administration, Canada's hotel sector has exceeded expectations, driven by strong domestic travel and a post-pandemic resurgence in tourism. Nationwide occupancy rates have returned to pre-2014 highs, and RevPAR continues to climb. Europe and the Caribbean have also seen notable tourism growth, with popular destinations such as Rome, Italy, and Nassau, Bahamas, experiencing a drastic increase in visitor numbers.

The political moves in the USA have reinforced Canada's status as one of the world's most promising hospitality investment destinations — and highlights the critical need for leadership talent capable of sustaining this upward trajectory amid rapid expansion.

We have observed increased hiring activity across Canadian, Caribbean and European resorts, urban hotels, and boutique properties, with many groups seeking experienced general managers, operations directors, and revenue leaders to manage this renewed wave of opportunity.

The conversations emerging from this year's hospitality conferences confirm what we, at Renard International, have long believed: the industry's evolution is no longer linear — it's multifaceted and interdependent. As of October 2025, labour, brand identity, and trade dynamics intersect in ways that

demand both creativity and strategic leadership. Globally, there have been over five million online advertisements seeking hospitality talent, underscoring the industry's fierce competition for skilled employees.

As the global hospitality landscape continues to transform, one truth remains undeniably constant: **people drive performance, not brands.**

Whether that's through navigating wage shifts, reimagining brand identity, or managing cost volatility, the leaders who can adapt — with empathy and a vision — will define the industry's next era.