Fourth

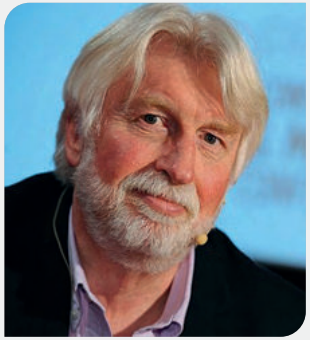
THE VIEW FROM THE TOP

How senior hospitality leaders see AI driving change above store

Insights from a survey undertaken by Nielsen iQ in collaboration with Peach 20/20 and Fourth in March 2026

PEACH 20/20 NIQ

Foreword



Conversations about AI in hospitality are everywhere - in every podcast, conference agenda, software vendor pitch and boardroom conversation. The industry has already embraced some uses for AI, like for scheduling and forecasting. But beyond that there's little indication about how executive leaders within the sector are thinking of AI. How is it changing the way they work? What role do they see it having in the future of their business?

That is what this research set out to establish. Commissioned by Fourth and Peach 20/20, and conducted by Nielsen iQ in March 2026, the survey gathered the views of 104 senior hospitality leaders from across the UK — CEOs, COOs, CFOs and directors representing a broad cross-section of the market. We wanted to understand how AI is being used at the top of hospitality businesses, where strategic decisions are made, and investment is directed.

What the findings reveal is a leadership cohort that is not just aware of AI, but personally fluent in it and impressively grounded when it comes to expectations of what it could drive, and where it will be most useful to their businesses. The picture that emerges is one of a sector being driven from the top towards an AI-led transformation that will have a far greater and more apparent impact on central operations than it will have at individual site level. It may not change the essence of hospitality, but it will change the way hospitality does business.

Peter Martin
Peach 20/20 Founder and Executive Director

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The Hospitality Leaders AI Survey

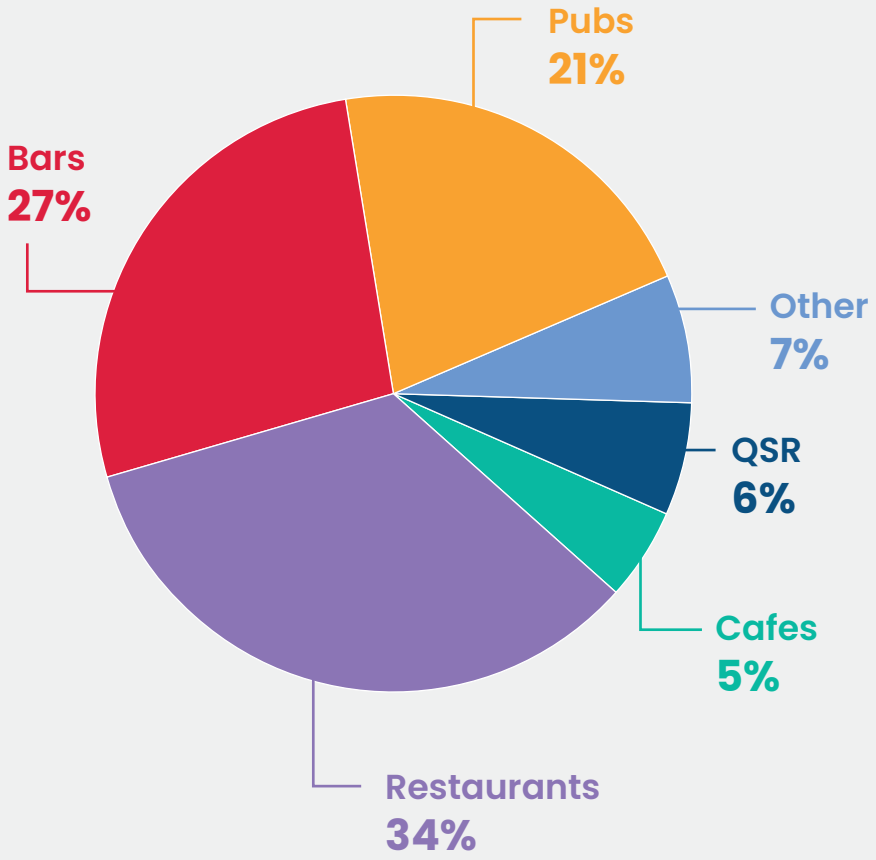
Commissioned by **Fourth** in partnership with **Peach 20/20** and **Nielsen iQ**

104

CEOs, COOs, CFOs & Directors

5–100+

sites operated



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EXECS ARE HOOKED ON AI

99%

of senior hospitality leaders are already using AI.

AI is already integral to how senior leaders work. The average hospitality executive now uses five AI tools regularly, and 28% would define themselves as ‘super users’ who use six or more tools regularly. General AI tools like ChatGPT and Claude are now common-place among senior leaders, with 69% using paid-for subscriptions. This shows that AI is a technology changing how businesses function, and how work is done, at all levels.

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HOSPITALITY LEADERS AGREE AI IS HERE TO STAY

94%

of hospitality executives are optimistic about the future use of AI.

Enthusiasm for AI at the top of hospitality businesses is near-universal. Investors routinely ask about adoption and innovation, and senior operators are spearheading AI adoption, with 36% describing themselves as very optimistic and a further 58% cautiously optimistic.

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AI ADOPTION IS BEING DRIVEN FROM THE TOP

78%

of operators say adoption is being led by the board or C-suite.

Previous waves of hospitality technology, like workforce management, inventory systems, and POS platforms, were typically championed by operational and IT teams.

AI has moved in the opposite direction. Senior leaders are making investment decisions based on their own AI experience and successes. This is a leadership cohort setting direction from a position of genuine familiarity with what the technology is capable of.

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THE CAPABILITY OF AI IS EXCEEDING EXPECTATIONS

75%

of leaders say AI has met or exceeded expectations for strategy creation.

Leaders have been surprised by AI's capability to support core parts of their own workflows. One example is strategy creation, where only 18% expected it to deliver in this area, yet 75% say it has met or exceeded expectations.

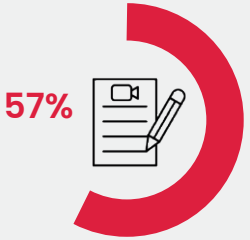
34% of operators expected AI to deliver benefits in financial control, yet 72% say it has at least met their expectations in that regard.

Common tasks CEOs use AI for:

Email drafting

Image creation

Data analysis



Meeting summaries

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LEADERS ARE CAUTIOUSLY INVESTING IN AI

88%

of senior hospitality leaders expect AI investment to grow over the next two years.

Investment in AI is broadly expected to grow across the sector, with 24% of leaders saying they think it will grow substantially, while 64% expect to invest slightly more.

Only 11% cited budget as being a barrier to AI adoption, suggesting investment in AI tech is both important and realistic.

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EXECUTIVE FLUENCY DOESN'T EQUAL ORGANISATIONAL ADOPTION

Only 13% of leaders describe AI as deeply embedded across their organisation, with many still experimenting.

LEADERS 13%
AI is the operational standard, deeply embedded across the organisation.

SCALERS 28%
AI is in regular use across the business.

ADOPTERS 25%
AI is used in some areas of the business, but not everywhere.

EXPLORERS 34%
Still experimenting or not yet started.

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The greatest impact of AI will occur at HQ

Perhaps one of the most striking findings of our research was that nearly half of operators expect AI to have the most disruptive impact on central office roles.

When asked where they think the roles most impacted by AI would be, 45% of the leaders surveyed agreed that AI will lead to smaller teams in central offices, compared to just 7% who thought job losses would be likely among frontline staff.

The impact of AI is far more nuanced than just how more roles will be lost - in fact, 25% of respondents also believe AI can lead to job creation at HQ - but it does give an indicator that the type of work and the skills required is set to significantly change.

AI will materially change roles currently engaged in reporting, planning, governance, finance, marketing and more - just as it is in corporate offices beyond hospitality.

By contrast, the human touch on the frontline remains sacrosanct for most hospitality concepts. Yes - AI will play an important role, particularly to support General Managers, but the visible impact will likely be less transformational.

Christian Berthelsen
Fourth CTO

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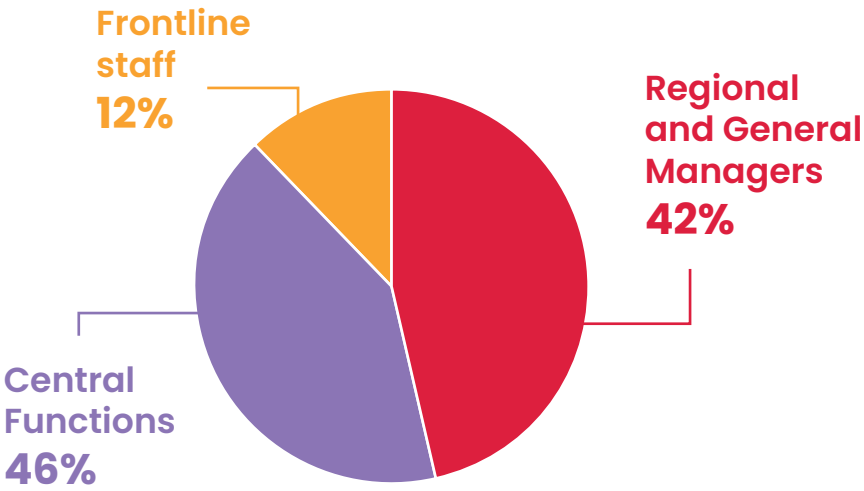
AI SKILLING IS FOCUSED ON CENTRAL TEAMS

62%

of leaders cited user skill gaps is the greatest barrier to successful AI usage.

Respondents cited central functions as the priority for AI upskilling, indicating a focus on strategy and planning over execution.



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GUARDRAILS OVER CENTRAL CONTROL

Only

9%

think AI should give central management direct control over individual sites.

Most operators think AI will enable central teams to set parameters based on a detailed understanding of the entire estate, with site managers operating within those guardrails. 76% of leaders expect AI to play a key role in connecting site-level teams with central guidance (e.g. next best actions) or aligning to shared goals across the estate.

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HUMANS VS AI – WHO SHOULD LEAD?

Only

5%

of leaders believe AI should lead tasks, with humans just reviewing the outputs.

Signalling a strong belief that humans should remain firmly in control of decision making, 58% of respondents believe humans should lead tasks, utilising AI as an assistant. A further 35% believe efforts should be balanced.

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AI WILL IDENTIFY AND CLOSE PERFORMANCE GAPS

Over two-thirds of leaders believe the competitive advantage of AI lies in increasing the speed of decision making.

When operators were asked about the AI use cases most likely to give them a competitive edge, 67% selected ‘speed of analysis and action’ as a key benefit. 60% also chose ‘tracking business performance’ as an important use case. When taken in combination, operators are banking on AI to help them identify performance gaps across locations, and quickly select and implement the right corrective actions.

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Building a shared AI context to drive performance

The AI revolution at HQ is well underway. As a firm believer in its potential to transform hospitality, I was encouraged, but not surprised, by how deeply it is now embedded across the C-suite. Our latest research reflects a shift we've observed at Fourth for some time.

As AI adoption grows, conversations are moving beyond individual roles to the impact on the entire business. Leaders are increasingly energised by its ability to drive performance and productivity.

That being said, one CEO's comment in the survey captured a critical challenge ahead:

> *"Without it being centralised - each function will be teaching the AI something different. You need a central AI that understands your business before giving advice and analysis that will optimise performance."*
>
> **CEO survey respondent**

The expansion of AI across functions brings a growing risk of fragmentation (aka AI Sprawl): scattered tools, partial views, and conflicting recommendations. This highlights the need for a centralised intelligence layer: a unified context for all AI tools and agents.

In this model, HQ defines strategy while frontline teams execute with precision. Crucially, it enables learning from top-performing locations and scaling best practices across the business.

Only by architecting this central intelligence layer can hospitality unlock AI's full potential, an approach central to Fourth's vision for the industry's future.

Christian Berthelsen
Fourth CTO

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hello@fourth.com

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+44 (0) 2075343700

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