The Customer Experience Divide in Hospitality

Same booking.
Different story.

moneypenny



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About the research

To understand the gap between what businesses believe they're delivering and what customers actually experience, Moneypenny commissioned research among two complementary audiences across the UK in January 2026.

- **Business decision-makers: 2,000 senior decision-makers, including a dedicated sample of 200 hospitality sector leaders**
- **UK consumers: 5,001 adults, nationally representative**

Both surveys were conducted online. Where themes overlap, questions were aligned to enable direct comparison, with gaps reported as percentage-point differences to quantify the customer experience divide.

Results are shown as percentages. Figures may not total 100% due to rounding; totals may exceed 100% for multi-select questions.

CENSUSWIDE
THE SURVEY CONSULTANTS

Research conducted by Censuswide, a member of the MRS and British Polling Council, in line with the MRS Code of Conduct and ESOMAR principles.



200
hospitality sector leaders



Company size
5-1,000
employees



5,001
adult, UK consumers

In hospitality, experience is everything. Or at least, that is how the sector is often described.

Hotels, restaurants and venues invest heavily in atmosphere, service and personal touches. The goal is not simply to meet expectations, but to exceed them: creating moments that feel memorable, effortless and worth returning to.

But this research points to something slightly different.

For many customers, the experience is judged much earlier than the moment of arrival. Before the meal is served, before the room is entered, before any in-person interaction happens at all, it is being shaped by the very first attempt to make contact.

That might be a phone call to check availability, a web enquiry about a booking, a message about dietary requirements, or a last-minute request made outside standard hours. In those moments, customers are not evaluating ambiance or brand. They are evaluating responsiveness, clarity and ease.

What stands out in the findings is that hospitality businesses are not lacking intent. The sector understands the importance of service, and in many cases places even greater emphasis on personalisation and attentiveness than customers themselves expect.

But customers are not always feeling those strengths where it matters most.

Instead, they encounter delays, unclear next steps, or contact routes that feel slower or less reliable than expected. In a sector where decisions are made quickly and alternatives are always visible, that early friction can determine outcomes before a business even has the chance to show what it does best.

The opportunity for hospitality is not to rethink service entirely. It is to ensure that the experience customers expect inside the venue is already being signalled from the very first interaction, because in hospitality, the experience doesn't begin at the door. It begins the moment someone tries to book.



Joanne Tattum
Corporate & Hospitality Growth Manager, Moneypenny

First-touch friction

Hospitality doesn't have a service intent problem. It has an entry-point problem.

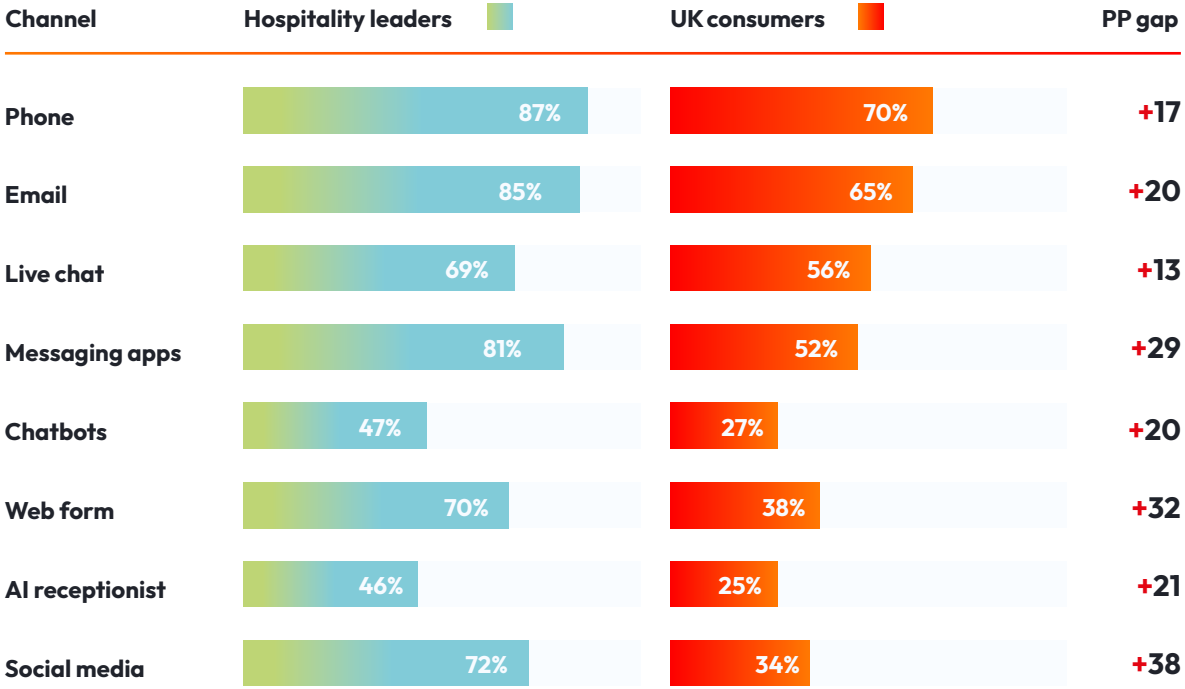
The sector is built on great service and personalised experiences. But customers don't encounter that first. They encounter the route in. That is where the gap appears.

Across every channel, hospitality businesses are significantly more confident than customers in how well those channels perform. Phone leads strongly: 87% of hospitality leaders say it meets expectations, compared to 70% of consumers. Email is similarly robust at 85% versus 65%. But the gap widens sharply across digital channels: messaging apps (+29pp), web forms (+32pp) and social media (+38pp).

Compared to the wider business market, hospitality is slightly more optimistic on some digital channels. Messaging apps score 81% in hospitality versus 76% across all sectors. Web forms sit level at 70% for both. This suggests the gap is not purely sector-specific. It reflects a structural challenge common across UK businesses, but one hospitality cannot afford to ignore.

Customers form their first impression before any conversation begins, based on how simple, fast and clear it is to reach the business.

How well do different communication channels meet customer expectations?



Hidden revenue loss

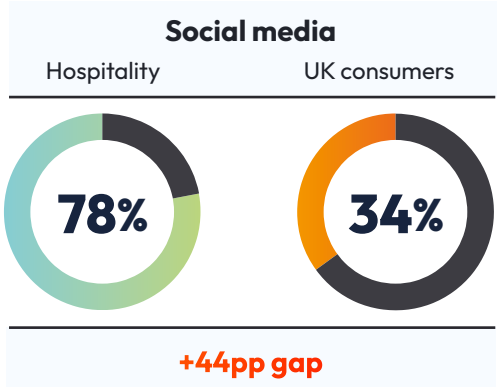
The gap becomes more significant when viewed through the lens of conversion.

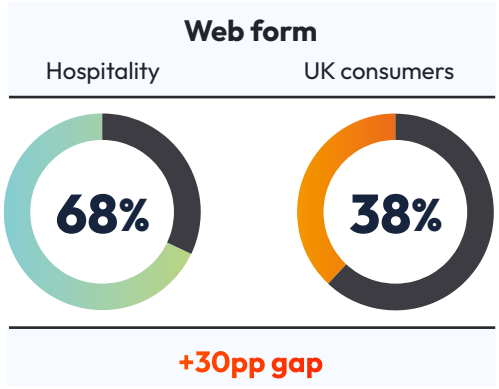
Channels that hospitality businesses rate as effective for driving bookings are often the same ones that customers rate as least satisfying. Social media is seen as effective for conversion by 78% of hospitality decision-makers, yet only 34% of consumers say it meets their expectations. Web forms show a similar pattern (+30pp), as do AI receptionists (+25pp) and chatbots (+20pp).

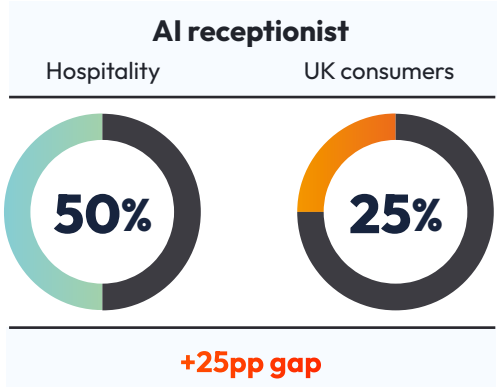
This mirrors the wider market, where businesses consistently overestimate the performance of the same channels. The gap is not unique to hospitality, but the commercial stakes in a high-intent, rapid-decision sector make it particularly costly.

When a channel is seen internally as effective but experienced externally as frustrating, friction turns directly into lost revenue. In hospitality, that loss is rarely visible. Customers don't report it. They simply book elsewhere.

How effective do you believe each of the following contact methods are?







The one-shot era

Speed is no longer a differentiator. It's the entry requirement.

Customers now operate in a world of instant action. They book, order and confirm in moments, and hospitality sits directly inside that expectation.

Will consumers try again if they can't get through?

Measure	Hospitality leaders	UK consumers	pp gap
Likely to keep trying	74%	47%	**+27**

Response expectations by channel

Customers are not just impatient. They have clear expectations for each channel:

- **43%** expect the phone to be answered within minutes
- **43%** expect live chat to respond within minutes
- **21%** expect email to be answered within the hour

Miss these windows and the opportunity often closes before the business has a chance to engage. In the one-shot economy, there is no follow-up moment. There is only the first response.



70% of consumers say they are likely to choose the business that responds first

2% say speed of response makes no difference to their decision

Master the basics

In a one-shot economy, the basics are not hygiene factors. They are conversion drivers.

On first contact, businesses and customers broadly agree on what matters. Speed, professionalism, clarity and access to a real person all rank highly across both groups, with hospitality leaders and consumers aligned above 80% on most dimensions.

But the gap appears in emphasis, and it matters.

What customers prioritise on first contact

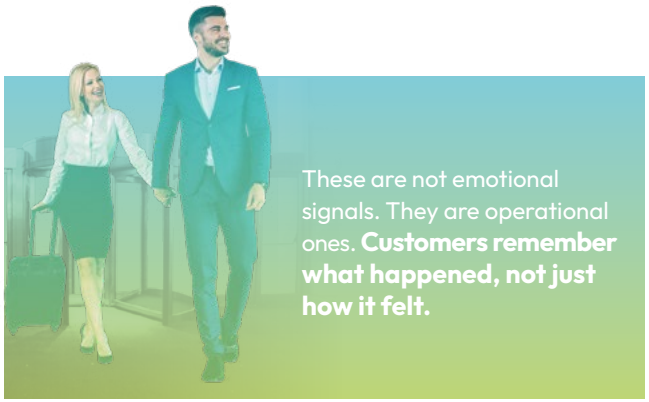
Measure	Hospitality leaders	UK consumers	pp gap
Speed of response	93%	83%	+10
Professionalism and courtesy	93%	83%	+10
Being understood and shown empathy	92%	82%	+10
Specialist knowledge or expertise	92%	82%	+10
Personalisation	85%	68%	+17

The standout finding is personalisation. 85% of hospitality businesses see it as critical on first contact, compared to just 68% of consumers. This suggests the sector is investing in high-touch, tailored experiences at the front door, when customers are actually focused on something more immediate.

What makes service memorable

That practical focus carries through into what customers remember about great service:

- **91%** Clear communication
- **89%** Issues resolved quickly
- **87%** Getting a full resolution first time



The after-hours advantage

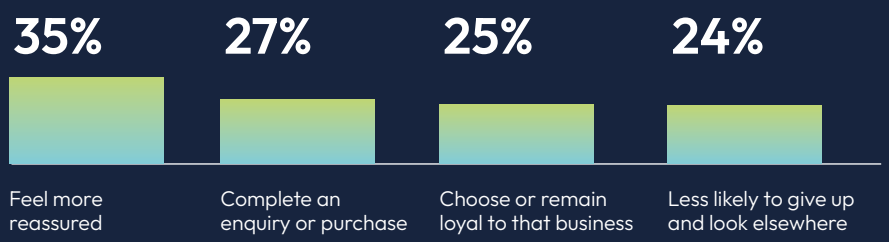
Customer demand doesn't sit neatly within working hours.

While 39% of consumers still prefer weekday 9am-5pm support, a significant share want to reach businesses outside that window: evenings, weekends and early mornings. Hospitality, as a sector built around leisure time, is particularly exposed to this.

Hospitality businesses recognise the competitive upside more than most:

- 51% say out-of-hours availability helps them stay competitive (vs 43% across all businesses)
- 52% say it improves the customer experience (vs 48%)

Out-of-hours availability make customers more likely to:

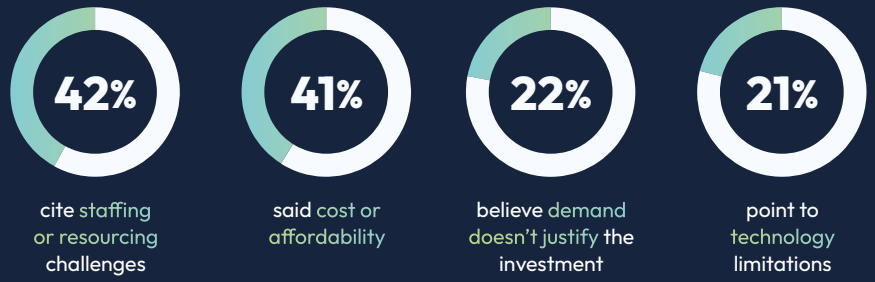


Only 13% say out-of-hours availability has no positive impact at all.

If you are not available, you are not competing. Customers rarely return to complete an interaction later. They resolve it elsewhere.

Why businesses struggle to deliver it

Despite recognising the value, many hospitality businesses are held back by practical constraints:



But demand is often invisible when businesses are closed. Customers rarely complain about the interaction that never happened. They simply move on, and the missed booking leaves no trace.

The AI comfort gap

AI is becoming a standard part of customer contact. But comfort has clear limits.

Customers are most at ease when AI makes interactions faster and simpler. Comfort is highest for answering calls promptly (59%), dealing with enquiries efficiently (58%), answering simple questions (57%) and booking appointments (55%). These are the scenarios where AI removes friction without adding complexity.

But comfort drops as interactions become more sensitive or high stakes.

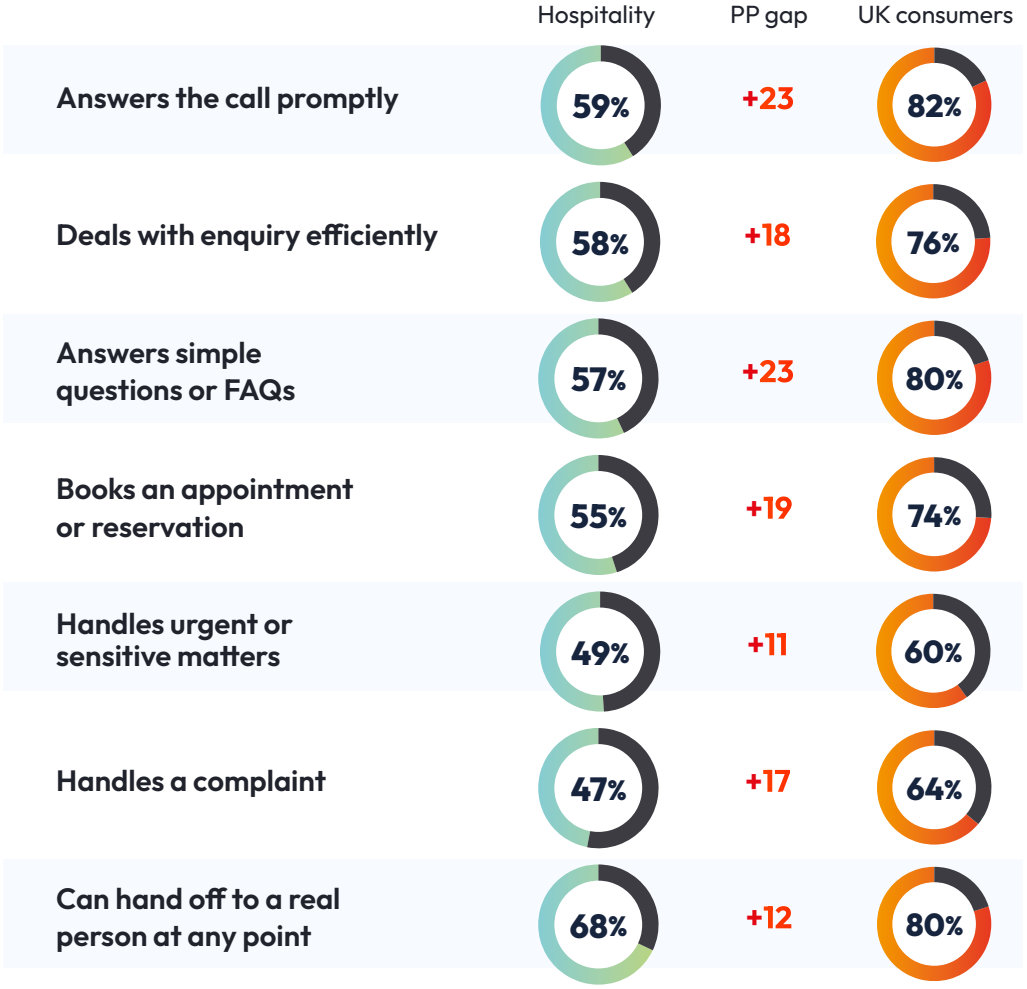
68% of consumers are comfortable with AI, provided they can switch to a real person at any point.

That single figure captures the essential dynamic.

Customers are not rejecting AI. They are setting conditions. The ability to escalate to a human is not a fallback feature. It is a prerequisite for trust.

Hospitality leaders are consistently more bullish on AI performance than the customers experiencing it, particularly when interactions move beyond the transactional into the sensitive or complex.

AI works best when it reduces friction without removing reassurance. When stakes are high, access to a real person is not a bonus. It is what makes the experience feel safe.



The average hides the real risk

The UK average provides a useful headline. But it conceals what is happening underneath.

Confidence in digital channels and AI-led contact varies sharply by age. Younger consumers are broadly comfortable with digital-first interactions. But among those aged 55 and over, that confidence drops significantly across almost every channel. This matters enormously for hospitality.

Higher-value bookings, including events, overnight stays, group reservations and fine dining, frequently involve older customers. Yet these are precisely the people least comfortable with the digital journeys many hospitality businesses are building around.

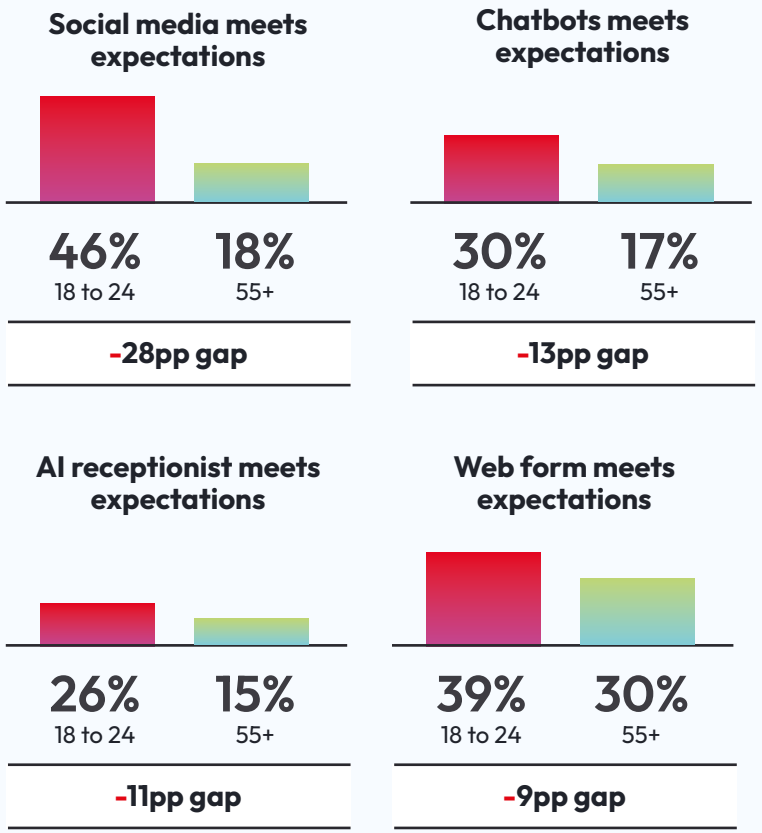
A journey that appears functional on average may still create friction, hesitation or drop-off among the customers who represent the highest revenue opportunity.

What the average hides

What the average suggests	What older-skewing businesses may actually be dealing with
Digital channels are performing reasonably well	Key routes may still feel awkward or confidence-draining for valuable customer segments
AI could improve speed and efficiency	AI may feel distancing or harder to trust when bookings are high-value or emotionally significant
The front-end journey looks serviceable overall	The lived experience may be slower, less clear and less reassuring than the metrics suggest

When you assess customer experience, whose experience are you measuring? The biggest risk is not the average journey. It is the one your highest-value customers are actually having.

Where confidence changes by age



Same booking, different story

Businesses and customers can move through the same interaction and walk away with very different impressions.

Businesses see effort and intent. Customers notice ease, clarity, and whether they got help without friction. That gap, visible in every chapter of this report, is the customer experience divide.

Hospitality does not have a service values problem. The sector performs strongly on empathy, personalisation and the human side of service. But those strengths are not what customers encounter first. They encounter the mechanics of the journey, and that is where confidence, and conversion, begins to form.

Across the report, the same pattern appears:

- Early contact points carry more friction than the sector recognises
- Speed and clarity matter more than most journeys are designed around
- The ability to reach a real person is a trust signal, not a fallback
- Older and higher-value customers face greater barriers with digital-first contact
- AI can improve access, but only when human escalation is clearly visible

In hospitality, experience has always been the differentiator. But the experience doesn't start when the customer arrives. It starts when they try to get in touch. And increasingly, that is where bookings are won or quietly lost.

Five things to get right

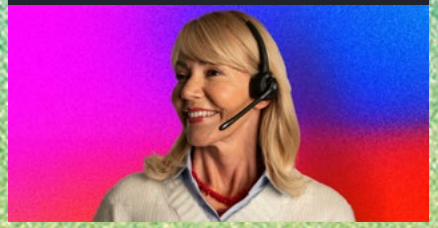
- Speed: respond quickly, especially in high-intent moments when customers are actively choosing
- Clarity: explain what happens next and when. Uncertainty is a reason to look elsewhere
- Availability: be present when customers are making decisions, including outside standard hours
- Human access: keep the route to a real person clear and easy
- Smart AI use: deploy AI to reduce friction, not to replace the reassurance customers need

Every conversation is an opportunity. Make sure you're ready for it.

Moneypenny is the UK's leading customer conversations partner, blending exceptional people with proprietary AI technology to deliver trusted experiences, so nothing slips through the crack and every customer feels heard first time.

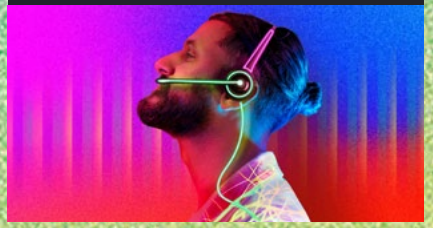
Telephone Answering

Your dedicated Moneypenny Receptionist answers and fulfils caller needs with the professionalism and warmth of someone who genuinely knows your business, whenever you can't.



AI Receptionist

Built for routine calls that don't require a human every time. Our AI Receptionist schedules appointments, handles FAQs, routes calls and collects data accurately, with a clear route to a real person when it matters.



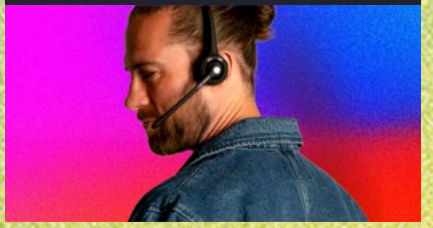
Outsourced Switchboard

For larger organisations managing high call volumes, we provide seamless switchboard outsourcing that flexes with demand and removes the burden of in-house overhead, without losing the human touch.



Lead Management

We qualify leads, book appointments, take payments and integrate seamlessly into your CRM, so your people stay focused on faster conversion.



The research showed the gap. Now’s the time to close it.

Find out how Moneypenny will help your business deliver on every conversation.

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