

The AI Gap

Why some STR operators are pulling ahead



PriceOptimizer™

~ Pricing forecast

↑↓ Pricing strategy



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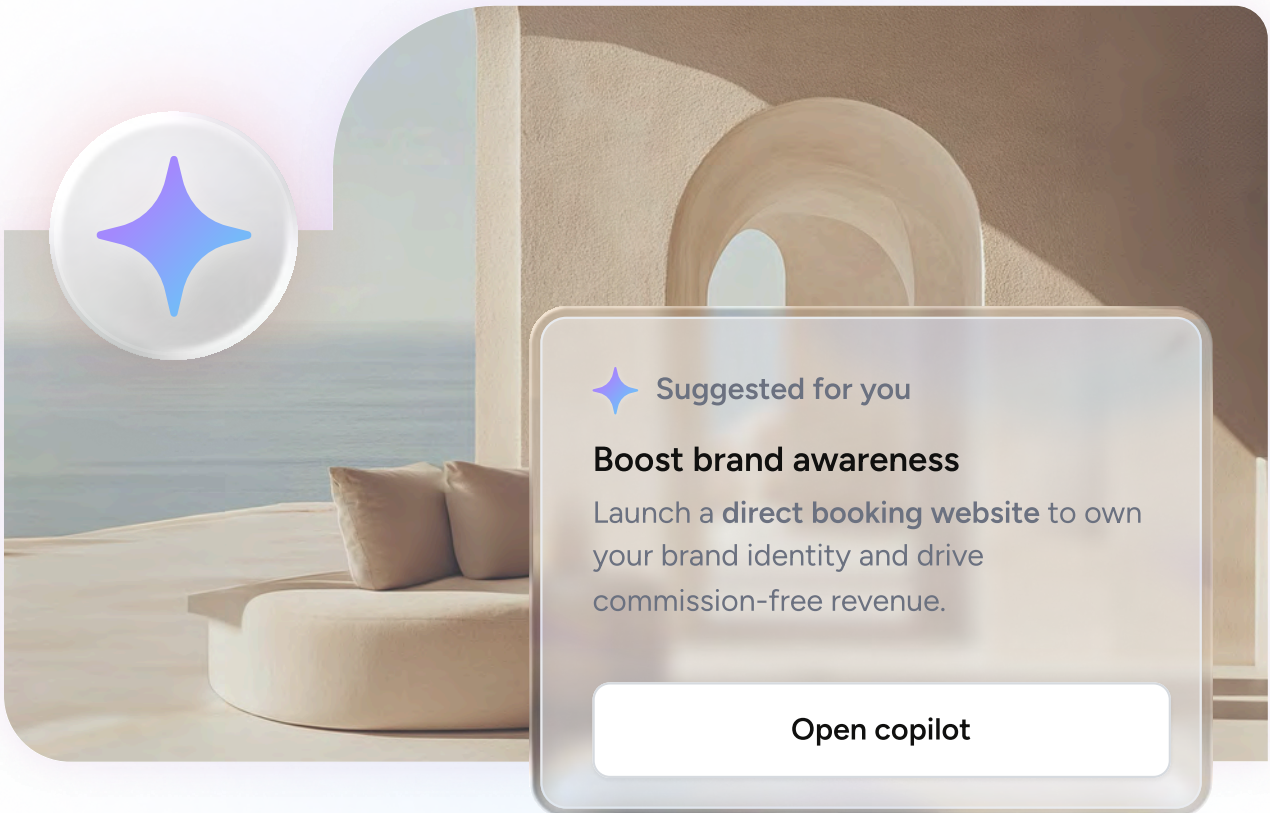
Executive summary

We surveyed 534 short-term rental (STR) operators globally, the majority of them established businesses with two or more years in the industry, to find out how they're really using AI, and what they want it to do next.

We learned that AI has moved from curiosity to daily habit for the majority of property managers, with 81% already using it operationally. They're already seeing productivity gains, and are keen to get to even greater operational efficiency in 2026.

But here's the gap worth paying attention to: most operators are still using generic chat tools. Only 25% use AI that's built into their PMS. This group is saving significantly more time, reporting higher confidence, and feeling ahead of the industry.

This report breaks down what's working, what's not, and where the biggest opportunities are for property managers ready to move from casual AI use to real operational impact.



The state of AI adoption in short-term rentals

The majority of property managers surveyed, 83%, had already used AI for personal purposes: writing emails, translating content, searching for information. Over 80% have used it for business too.

83%

Used AI for personal use in 2025

TOP TOOLS

Paid chat models (ChatGPT/Gemini/CoPilot/Claude) **63%**

Free chat models (ChatGPT/Gemini/CoPilot/Claude) **57%**

Image generation tools (Nano Banana/Midjourney/DALL-E) **21%**

TOP PURPOSES

Writing and communication (ex. Drafting emails) **74%**

Translating or summarizing (ChatGPT/Gemini/CoPilot/Claude) **56%**

Searching for information (ex. As an alternative to Google) **71%**

Planning a vacation **38%**

But only 25% of those using it for business have used AI tools built into their PMS. That means 3 out of 4 operators appear to be copy-pasting between a chat window and their management software instead of running AI where their data already lives.

The tool mix tells the same story. For personal use, paid LLM chatbots (63%) and free chatbots (57%) dominate. For business, the same chatbots still lead (54% paid, 33% free), with PMS-integrated tools a distant third.

81%

Used AI for business in 2025

TOP TOOLS

Paid chat models (ChatGPT/Gemini/CoPilot/Claude) **54%**

Free chat models (ChatGPT/Gemini/CoPilot/Claude) **33%**

AI tools built-in to my PMS **25%**

Image generation tools (Nano Banana/Midjourney/DALL-E) **15%**

Hospitality-specific AI tools outside of my PMS **15%**




Automation tools **13%**

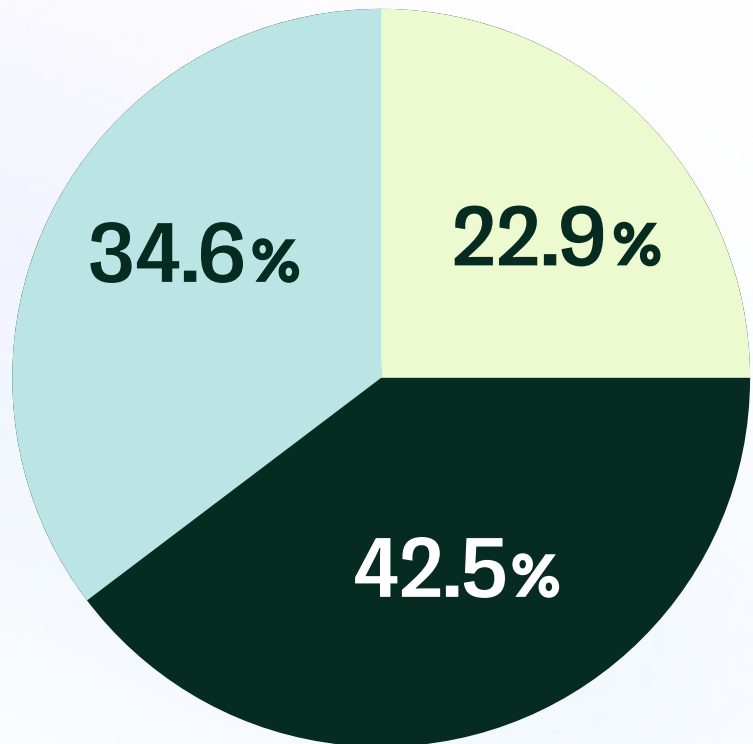
That use is still quite limited, though. The single biggest group, 42.5%, described their AI use as "daily but casual." Another 34.6% said "occasional."

Only 22.9% called it "integral to our business," suggesting most are still dabbling rather than building AI into their core operations.

Frequency and seriousness of AI use

How would you describe AI use in your business?

-  OCCAISONAL
-  DAILY BUT CASUAL
-  INTEGRAL TO OUR BUSINESS



"We receive around 12,000 messages a month; we receive guests from more than 50 countries, in 10 different languages. AI gives us the tools to respond in the right language, with the right tone.

Capitalia
MEXICO | 600+ LISTINGS

Where AI is already saving time *(and where it's not)*

Adoption is an important measurement, but measurable impact is what STR operators are really trying to nail down. So where is AI actually moving the needle, and does it matter whether you're using a standalone chatbot or AI that's built into your property management software?

Guest communication is the top time-saver across the board

Ask property managers where AI saves them the most time and 62% give the same answer: guest communication. That's nearly double the next closest category.

AI handles the speed and consistency that human teams struggle to maintain at scale, especially across multiple time zones and languages. As one survey respondent noted, AI-powered messages "make me sound more professional."

Guesty users are:

3x

more likely to report saving 10+ hours per week with AI

Guesty users get more out of AI

Among all operators using AI in their business, 35% save 2–5 hours per week, 18% save 5–10 hours, and 17% save 10 or more hours.

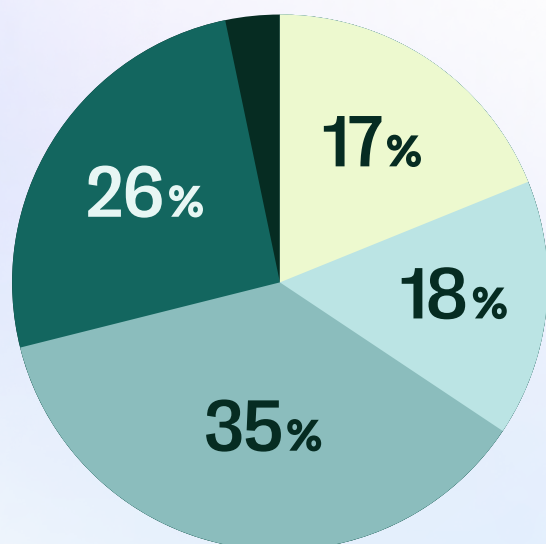
Guesty users pull away from the pack. They're 3x more likely to report saving 10+ hours per week with AI than respondents who don't use a PMS. That's more than a full working day returned to the business.

The advantage shows up in specific use cases too: 58% of Guesty users use AI for guest communication, compared to 43% of those on other PMS platforms.

As one operator put it: "It'll just read the chats and spit out a sympathetic message. I look at it and go, yep, that's perfect."

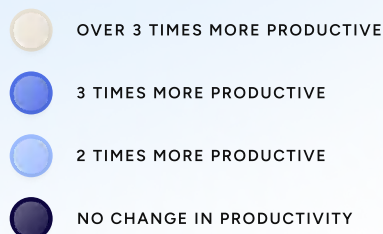
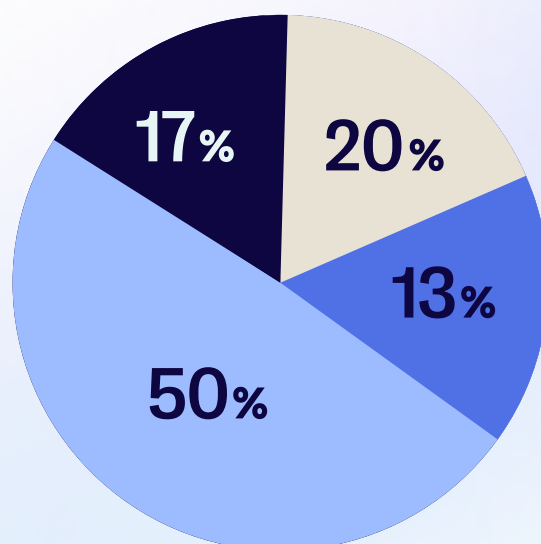
Time Saving

of those who use AI in business



Increased productivity

of those who use AI in business



What operators want *next* from AI?

84% want to use AI more or for more advanced tasks

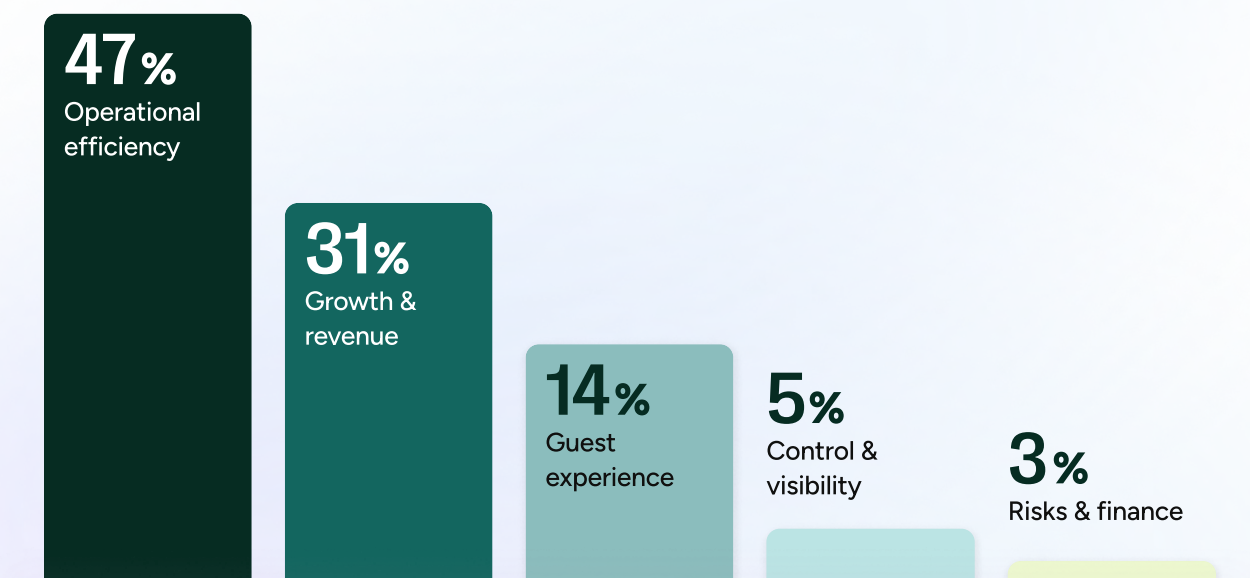
The overwhelming majority of respondents intend to deepen their use of AI in 2026. Of them, 65% want to use AI more frequently, doing more of what they already do.

But 35% want to expand their knowledge and use AI for more complex purposes, such as monitoring revenue and growth, automating accounting, optimizing pricing in real time, building upsell workflows, and connecting different tools into a single operating system.

“To continue to monitor growth and revenue through better analysis... seeking more opportunities for alternative revenue streams while optimizing pricing. Creating more frictionless methods of upselling.”

Survey respondent

What challenge are you most interested in solving with AI in 2026?



Nearly half of all STR operators are saying the same thing: help me run my business better. More efficiently. With less manual work and more consistent output. But what does "operational efficiency" actually mean?

What does operational efficiency mean to you?

Introducing smarter/automated processes	76%
Standardized processes across properties	49%
Cost optimization	49%
Automating some or most tasks with AI	49%
Saving on labor	33%
Real-time visibility into operations	27%
Outsourcing some or most tasks	18%

Operators want AI woven into the way their business operates: handling the repetitive work, standardizing the inconsistent work, and giving them the visibility to make better strategic decisions.

As one respondent put it: "It's the idea of being able to do mundane tasks better than humans can do, and therefore being able to run a leaner team to focus on expansion."

Which of these areas are most ripe for AI innovation in your opinion?

Guest communication automation	57%
Pricing and revenue optimization	49%
Listing descriptions and photos optimization	30%
Automating operational tasks and maintenance	19%
Direct booking websites <small>(website / SEO / conversion optimization)</small>	19%
Data analysis support	19%
Reviews management and reputation growth	18%
Accounting automation	14%
Financial reports	10%

"Connect different tools and systems so that we can create better workflows and thus better guest experiences."

Survey respondent

What holds operators back from going further with AI

Guests are trusting you with their vacation, their family trip, their money. Property managers know that a wrong price, an off-tone message, or a missed detail can cost a booking, a review, even a long-term relationship. That instinct to protect the guest experience is deeply embedded in the

industry, and it shapes how operators think about handing tasks over to AI.

So while 84% are excited about AI, a third say the risk of inaccuracies and hallucinations is their biggest barrier to deeper adoption.

	What barriers limit your adoption of AI?	Why do you think other businesses are reluctant to integrate AI?
Risk of inaccuracies	33%	30%
Not aware of solutions	20%	46%
Uncertainty about how to start implementing AI	27%	41%
Lack of time	19%	19%
Lack of budget	—	21%

Surprisingly, price barely registers as a concern. The real worry is trust.

That trust question plays out in how operators think about their guests, too. About half believe guests are open to interacting with AI during booking and check-in. But 53% agree that guests will be dissatisfied if AI fully replaces human service. The line is clear: AI for the routine, speed-dependent tasks. Humans for the moments that matter.

When asked directly which areas should be protected from AI, the answers reinforce that instinct.

Price barely registers as a concern. The real worry is trust.

The data here reflects real deliberation. Operators are engaged with AI, productive with it, and planning to use more of it. They're also thinking carefully about where the human line should sit. For an industry built on personal service and trust, that's exactly the right conversation to be having.

Which areas of the business do you believe should be protected from AI?

Ethical decision making	53%	Maintaining property uniqueness	18%
Nuanced customer issues	51%	All guest communication	16%
Building trust with guests	43%	Long-term strategic planning	12%
Understanding local market nuance	18%	Innovative marketing	6%

That instinct to protect the guest experience is deeply embedded in the industry.

Inside Guesty's AI operating system

The survey data is consistent: operators who use AI inside their PMS get better results. Guesty users adopt more tools, save more hours, and describe AI as "integral" at higher rates.

When asked whether they see their business as ahead of the industry, they're significantly more likely to say yes.

Every AI tool inside Guesty is trained on over 10 years of data from hundreds of thousands of listings.

That depth means the AI understands the patterns, language, and operational rhythms specific to the STR industry.

	% of Guesty subscribers using built-in AI tools	% of users of other PMS platforms using AI tools
Guest communication	58% REPLY AI™ GUEST COMMUNICATION	32%
Pricing optimization	27% GUESTY PRICEOPTIMIZER™	27%
Listing description generation	26% LISTINGS DESCRIPTIONS GENERATION	31%
Website builder	24% GUESTY WEBSITE BUILDER	14%
Reviews management	23% REVIEWSMART AI™	11%
Fraud prevention	5% GUESTYPAY PROTECT™	6%

A complete suite of cutting-edge tools

★ Guest communication: **ReplyAI**

Guest communication is the top time-saver in this survey, by a wide margin. Guesty is launching ReplyAI Autopilot, moving from AI-assisted messaging to fully automated guest communication you control.

Autopilot only responds when confidence is high, handles inquiries in any language with a natural tone matched to your brand, and steps aside for sensitive, negative, or complex conversations.

You choose which properties, which hours, and which message types it handles. It pulls from your live Guesty data, including listings, reservations, policies, and past conversations, so every reply is contextual and accurate.

When a guest message contains an operational request, the AI detects the issue and automatically suggests a follow-up task, all within an approval flow that keeps you in the loop.

★ Reputation and reviews: **ReviewSmart AI**

ReviewSmart AI provides word-by-word analysis of guest reviews and pulls out actionable insights, telling you exactly what guests are praising and what they're flagging so you can easily improve your guest experience.

On the outbound side, Guesty's review management tool generates AI-powered responses that match the tone and detail of each review, keeping quality high and response time low across every listing in the portfolio.

★ Revenue management: **PriceOptimizer**

Pricing topped the list when operators were asked where AI should go next. Guesty PriceOptimizer uses machine learning algorithms that adapt to your local market in real time, factoring in demand trends, seasonal patterns, competitive amenity sets, and your historical performance to set rates that maximize revenue.

The AI Revenue Center goes further. It continuously analyzes listing performance and market signals to surface prioritized, actionable recommendations across pricing, availability, and listing quality. Instead of digging through dashboards and reports, operators see what matters most right now and can apply changes right inside Guesty.

Guesty platform data shows that listings using PriceOptimizer see an average 14.2% increase in total booked revenue after adoption.

★ Fraud and risk protection: **Guesty Pay Protect**

Fraud detection is one area where AI's pattern recognition actually outperforms human judgment. Guesty Pay Protect monitors every booking in real time, flags high-risk transactions, and prevents fraudulent payments before they go through. It removes that exposure without requiring operators to manually review every reservation.

Early adopter data shows a 25% reduction in chargeback frequency and a 30% reduction in monetary losses from chargebacks after activating the tool.

★ Listing optimization: **AI-crafted descriptions**

For a property manager adding 5 new listings in a month, Guesty's AI-generated, channel-optimized descriptions cut hours of writing down to minutes.

A Guesty analysis of nearly 11,000 listings found that 79.9% of those using AI-generated content scored high on SEO performance, compared to 64.3% for manually written listings. AI also nearly eliminated critically low scores across the board.

★ Direct bookings: **AI-powered SEO and website content**

Guesty's AI-powered website tools build site content in multiple languages, meta tags, and SEO structures designed to increase organic traffic and convert more visitors into direct bookings.

★ Data intelligence: **Guesty Copilot**

Copilot lets operators ask questions about their business in plain language ("What's my occupancy rate this month?", "Which listings are underperforming?", "How does my ADR compare to last quarter?") and get instant, contextual answers pulled directly from their live Guesty data, which you can also ask it to turn into downloadable reports.

No spreadsheets. No reports for you to build. No waiting for the end of the month to find out how things are going. Copilot turns your data into a conversation, making it possible to act on insights the same day they surface.



The Guesty AI roadmap

Nearly a third of operators want AI for more complex purposes this year.

Guesty is building toward that exact demand.

The **Property Knowledge Base** will let operators upload property-specific content, including photos, PDFs, manuals, and guides, and Guesty will extract, enrich, and connect that knowledge directly to ReplyAI and Copilot.

The result: AI that can answer the specific questions operators can't automate today, like where the trash room is or how to start a particular coffee machine.

The **PriceOptimizer AI Agent** will let operators define complex pricing and availability strategies in plain language instead of manually configuring rules. Describe a scenario, like gap-filling logic,

booking window adjustments, or restriction overrides, and the agent translates it into structured, executable rules within PriceOptimizer to drive more revenue.

To support more efficient operations, **AI-powered bank reconciliation** within Guesty Accounting will auto-match transactions from uploaded bank statements, reducing reconciliation from hours to minutes.

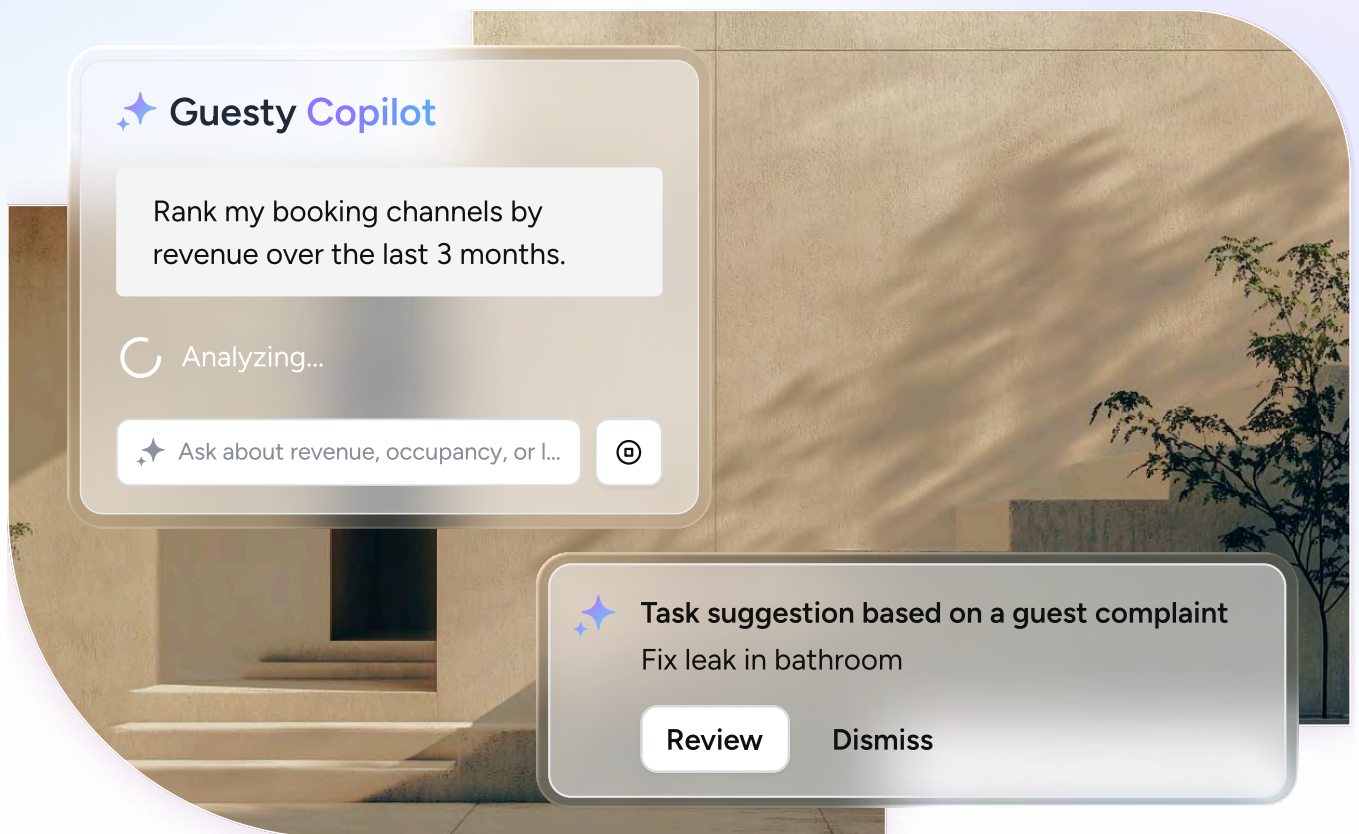
And an **AI Report Builder** will let operators describe the report they need in plain language instead of manually selecting filters and columns.

The tools operators told us they want in this survey are the same tools Guesty is actively building. The gap between "what I need" and "what my PMS can do" is closing fast.



See what AI can do with *your portfolio*

Book a personalized demo and we'll walk you through ReplyAI, PriceOptimizer, Guesty Copilot, and the rest of the AI toolkit, using your actual listings, your market, and your operational goals. No generic pitch. Just a clear picture of the time you could save and the revenue you're leaving on the table.



[Book your demo](#)