



## Short Term Rentals Stream

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### **Short-term rentals: Corporate clients, flexible stays: How STRs are evolving for business travel**

Moderator Valentina Shegoyan, founder of OPREIM, led a discussion with Florian Montag (Apaleo), Tom Fleming (AltoVita), and Rajdeep Gahir (Urban Rest) about how flexibility, technology, and guest expectations are reshaping the sector.

Speakers noted that corporate clients are increasingly seeking experience-driven, amenity-rich stays that combine the consistency of hotels with the comfort and liveability of home. This trend has been accelerated by changing traveller behaviours, with reduced booking lead times, greater price sensitivity, and a growing expectation of seamless, digital-first guest journeys.

Gahir highlighted how corporate and leisure travel are continuing to blend, with many travellers extending work trips for leisure purposes and expecting accommodation to cater to both needs. Urban Rest has responded by designing spaces with a strong emphasis on wellbeing, sustainability, and home-like features, which appeal to corporate clients looking for more than just a place to stay.

Fleming emphasised that corporates now want flexible housing solutions that can adapt to the mobility of global teams, as relocation, project-based travel, and distributed workforces become more common. AltoVita is focusing on how to streamline access to vetted, quality

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accommodation worldwide while also giving procurement teams the control and visibility they require.

Montag pointed to the role of technology and system integration in driving this evolution. He stressed that operators must invest in platforms that enable scalability, automation, and personalisation, while also helping to manage costs. At the same time, technology should not dilute the guest experience but instead support it.

Looking ahead, the panel agreed that consolidation, increased investment in digital infrastructure, and closer collaboration with real estate partners would shape the next phase of growth. Despite challenges such as rising development costs and fragmented regulations, short-term rentals are well positioned to capture a greater share of corporate travel by offering the flexibility and value that businesses now demand.

Panel highlights:

- Corporate clients are demanding flexible, home-like stays that balance work and leisure needs.
- Bleisure travel is growing and many business travellers now extend trips for leisure.
- Companies want housing solutions that support global mobility, relocations, and project-based travel.
- Technology and system integration are key to streamlining operations, scaling, and personalising guest journeys.
- Operators must balance cost control with maintaining brand identity and guest experience.
- Future growth will be shaped by consolidation, digital investment, and real estate partnerships.

**Short-term rentals: Deconstructing STR regulations and addressing overtourism**

Moderator Jessica Gillingham, CEO of Abode, led a discussion with Oliver Stern (Wheelhouse), Lisa Roads (The Holiday Property Coach), Christian Eckley (UnderTheDoormat Group), and Andrew Fenner (STAA) on how operators can navigate regulations, manage community impact, and support sustainable tourism.

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Fenner spoke to the professionalisation of the STR industry, noting that the current wave of regulation is part of a broader shift towards greater maturity in the sector. He stressed that the industry urgently needs clear, practical guidance to ensure operators understand their responsibilities and can comply without confusion. Fenner argued that without consistency and education, regulation risks leaving many operators behind.

Stern contributed a US perspective, pointing to examples where local rules have rapidly evolved in response to housing concerns. He emphasised that data and transparency are vital for regulators and operators alike, both to track impact and to create fair, evidence-based policies.

Roads echoed Fenner's point that independent hosts and smaller operators are often the most vulnerable to regulatory changes, as they lack the resources and professional support available to larger firms. She underlined the importance of sector-wide education and the need to make compliance accessible.

Eckley highlighted the wider overtourism debate, observing that the pressure on cities is not unique to STRs but linked to broader questions of urban planning, housing supply, and tourism management.

The panel concluded that the future of sustainable growth lies in clearer regulatory frameworks, stronger industry guidance, and a commitment to professionalisation. By embracing responsibility and working with governments, STRs can continue to play a positive role in local economies.

Panel highlights:

- Professionalisation is key: the rise of regulation signals a shift towards a more mature STR sector.
- The industry needs clear guidance and education
- Independent hosts and smaller operators are most vulnerable to regulatory change without support.
- Overtourism is a wider urban issue, requiring collaboration with cities and communities.
- Transparency and data can underpin evidence-based regulation and build trust with policymakers.

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## **Short-term rentals: Branded STR – The new face of urban hospitality**

Moderator Hannah Philip, founder of Arc Club, led a discussion with Sandrine Zechbauer (RMS), Roshan Ramlugan (AXA), and Ruth Whitehead (eviivo) on how operators and developers can use design, technology, and brand strategy to stand out in a competitive urban market.

Zechbauer highlighted the role of brand perception and technology as key differentiators. She noted that digital check-in, hyper-personalisation, and strong design identities help operators not only attract guests but also build loyalty in a crowded marketplace.

Whitehead emphasised that technology is enabling market convergence, allowing operators to pivot between asset classes such as serviced apartments, flexible living, and short-term rentals. She added that standardising core elements of the guest journey helps ensure a consistent brand experience across different types of accommodation.

Ramlugan spoke from an investment perspective, underlining that consistent operations and strong branding are critical to attracting institutional capital. For investors, reliability of income is closely tied to how well operators manage brand, reputation, and service delivery.

The panel also discussed how AI and automation can improve efficiency and guest satisfaction without removing the human touch that defines hospitality. They agreed that branded STRs should focus on relationships as much as technology particularly with corporate travel management companies, which remain important distribution partners.

Overall, the session showed how branded STRs are evolving into a distinct segment of urban hospitality, leveraging design, technology, and trust to capture both guests and investors.

Panel highlights:

- Brand and technology are powerful differentiators in a crowded market.
- Digital check-in and hyper-personalisation are shaping the guest journey.
- Standardisation across asset classes helps deliver consistent experiences.
- Investors value operational consistency and strong brand identity.
- AI and automation can enhance efficiency while preserving the human element.

## **Short-term rentals: Why the technology landscape needs urgent consolidation**

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Moderator Natasha Terinova, Partner at Reach UK: Second Century Ventures, led a lively discussion with Kate Cox (Guesty), Thibault Masson (Pricelabs), Alexander Lyakhotskiy (Pass the Keys), and David Whelan (Urban Rest) on whether the industry is reaching a tipping point for consolidation.

Masson illustrated the scale of the challenge, noting that Pricelabs already manages 150 PMS integrations and still faces issues with OTA synchronisation. This constant need to plug gaps demonstrates the limits of fragmented systems and the pressure operators face to keep up.

Lyakhotskiy reflected on the evolution of technology adoption, observing that if tools like AI and automation had been available a decade ago, the industry could have achieved efficiencies much sooner. He argued that automation is essential for scaling and should be embraced to simplify processes for property managers.

Cox brought the conversation back to hospitality, stressing the need to balance automation with human touch. While AI can streamline operations and guest communication, technology should support, not replace, the personal connections that define great service.

Whelan added that operators must decide where to lean on technology and where to retain personal interaction, especially in areas like customer service. He saw the biggest opportunities in smart integration and system consolidation, which could reduce costs and allow operators to focus more on guest experience.

The panel agreed that consolidation is not about reducing innovation but about standardising and connecting systems in a way that reduces friction, builds trust, and supports a more professionalised industry.

Panel highlights:

- Automation is vital for scale but must be implemented strategically.
- Consolidation should focus on integration and standardisation, not stifling innovation.
- A more connected ecosystem would reduce costs and free operators to focus on guest experience.

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