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Amadeus Insights

Travel Dreams

From data to delight

Contents

Foreword

Hospitality is being reinvented before our eyes – assumptions about value, experience, and differentiation are being challenged. Traveler expectations are shifting, technological change is accelerating, and economic uncertainty is reshaping how hotels and destinations compete. At Amadeus, we work to anticipate these developments, turning complexity into insight, and supporting confident decisions.

Travel Dreams 2026: From data to delight is the latest contribution to this mission. Our new report offers a sharp, comprehensive review of where the industry stands today – and where it is headed tomorrow.

This research project is among our most wide-ranging to date. By bringing together the perspectives of 6,000 global travelers from the largest outbound travel markets, 500 senior hoteliers from the markets that receive the most travelers, and a group of leading destination management organizations (DMOs), we uncover a holistic picture of the forces influencing the next chapter of hospitality.

What emerges is a clear tension, and opportunity, between what travelers value and what hotels and destinations are racing to deliver.

Travelers remain anchored to enduring fundamentals such as price, location, and safety. But how they expect these essentials to be delivered has changed dramatically. Personalization, digital convenience, flexibility, and emotional connection now sit at the heart of the modern travel experience.

Hoteliers and DMOs are responding, even as they face rising costs, data complexity, and evolving operational pressures, as well as changing geopolitical environments. Many see AI, automation, and smarter use of technology and data as critical levers to enhance efficiency, deepen loyalty, and unlock new revenue streams.

Throughout *Travel Dreams 2026*, readers will find insights that illuminate both these challenges – and, importantly, the strategic choices to address them. We consider where demand is evolving, how technology can elevate the guest journey, and the tools hoteliers and DMOs can use to turn data into meaningful, memorable experiences.

Here's to transforming travel, together.

Francisco Pérez-Lozao Rüter

President, Hospitality, Amadeus

Introduction

Just over a year ago, Amadeus unveiled *Travel Dreams 2025*, an innovative research project drawing on the opinions of thousands of travelers. They described the growing role of social media in trip planning decisions, how they were willing to pay often significant sums for a room with perfect features, and how the human touch remains vital for a successful stay.

This year, *Travel Dreams* returns with an expanded scope. In *Travel Dreams 2026*: From data to delight, the views of hoteliers and destination management organizations (DMOs) take center stage, alongside those of global travelers.

Amadeus-commissioned researchers questioned 500 leading hoteliers (with the title of general manager or above) within the markets that receive the most travelers, select DMOs, and 6,000 leisure and business travelers from the largest global outbound travel markets to create a representative sample of the contemporary hospitality landscape.

What are the key takeaways?

Hoteliers are this year focused on becoming more efficient, digital, and guest-centric, with rising costs, digital transformation, and hyper-personalization cited as the main challenges. Improving guest satisfaction is the top priority, driven by the power of online reviews, alongside higher expectations for flexible cancellations, mobile interactions, and personalized experiences.

They are investing heavily in Artificial Intelligence (AI) for revenue intelligence, forecasting, and automation, while being careful to preserve the human touch in guest services. Sustainability is also a major focus, with all hoteliers questioned planning investment in this area, and more than half allocating at least 5% of total spend. At the same time, hoteliers told researchers modern retailing offers strong revenue potential, with personalized upsells – such as early check-in, view selection, and in-room attributes – capable of generating significant new income.

Travelers increasingly expect flexible, tailored, and emotionally rewarding trips. Some 74% want personalization, and many show a strong willingness to pay for features that deliver time, control, and comfort. Inspiration still comes mainly from friends and family, but social media posts and ads are catching up as a driving force, and most travelers now rely on AI-generated search summaries rather than detailed research. However, despite growing automation and the ever-increasing capabilities of AI, travelers continue to value human-led service for many interactions.

For DMOs, the priority is converting digital demand into destination value, using data to target and diversify markets, and maintaining balanced year-round tourism activity. Travelers are clear on what they prize in their perfect destination, seeking mental wellbeing, open spaces, freedom, beautiful views, and opportunities to disconnect. It is down to DMOs to deliver.

Finally, many hoteliers and DMOs are focused on the critical importance of having a good generative engine optimization (GEO) and search engine optimization (SEO) strategy as search and inspiration continue to evolve.

Below, *Travel Dreams 2026* explores each of these findings in depth, charting a course ahead for the hospitality industry. First, what's keeping hoteliers awake at night?

Part I

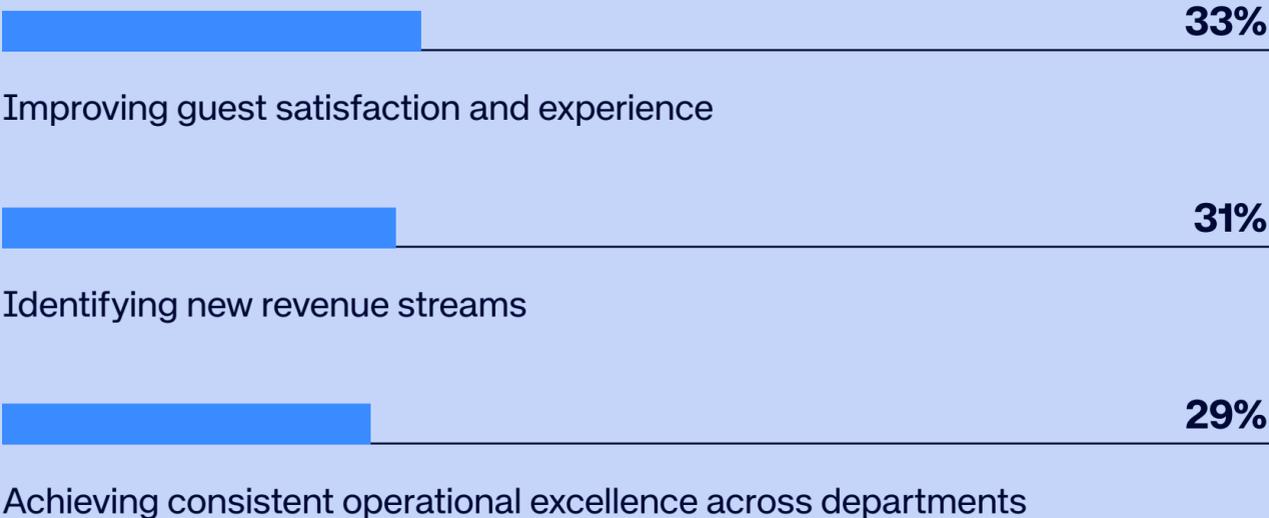## Building a new era of guest-centric hospitality

Hoteliers reported pressure to transform from many different directions. When asked about the top challenges for the year ahead, 'rising operation costs' (38%), 'digital transformation' (33%), 'delivering hyper personalization', and 'changing guest expectations' (both 31%) were all cited by the hoteliers interviewed for Travel Dreams 2026.

A serene 3% did, however, say there would be no challenges facing the hotel industry over the coming 12 months.

Asked specifically about the property they represent, hoteliers pointed to 'improving guest satisfaction' (33%) as their chief concern, ahead of even 'generating higher or more profitable demand' (27%). Guest experience is key.

What do hoteliers expect to be the top challenges facing their property this year

33%

Improving guest satisfaction and experience

31%

Identifying new revenue streams

29%

Achieving consistent operational excellence across departments

What do hoteliers expect to be the top challenges facing the industry this year:

38%
Rising operational costs

33%
Digital transformation

31%
Delivering hyper personalization
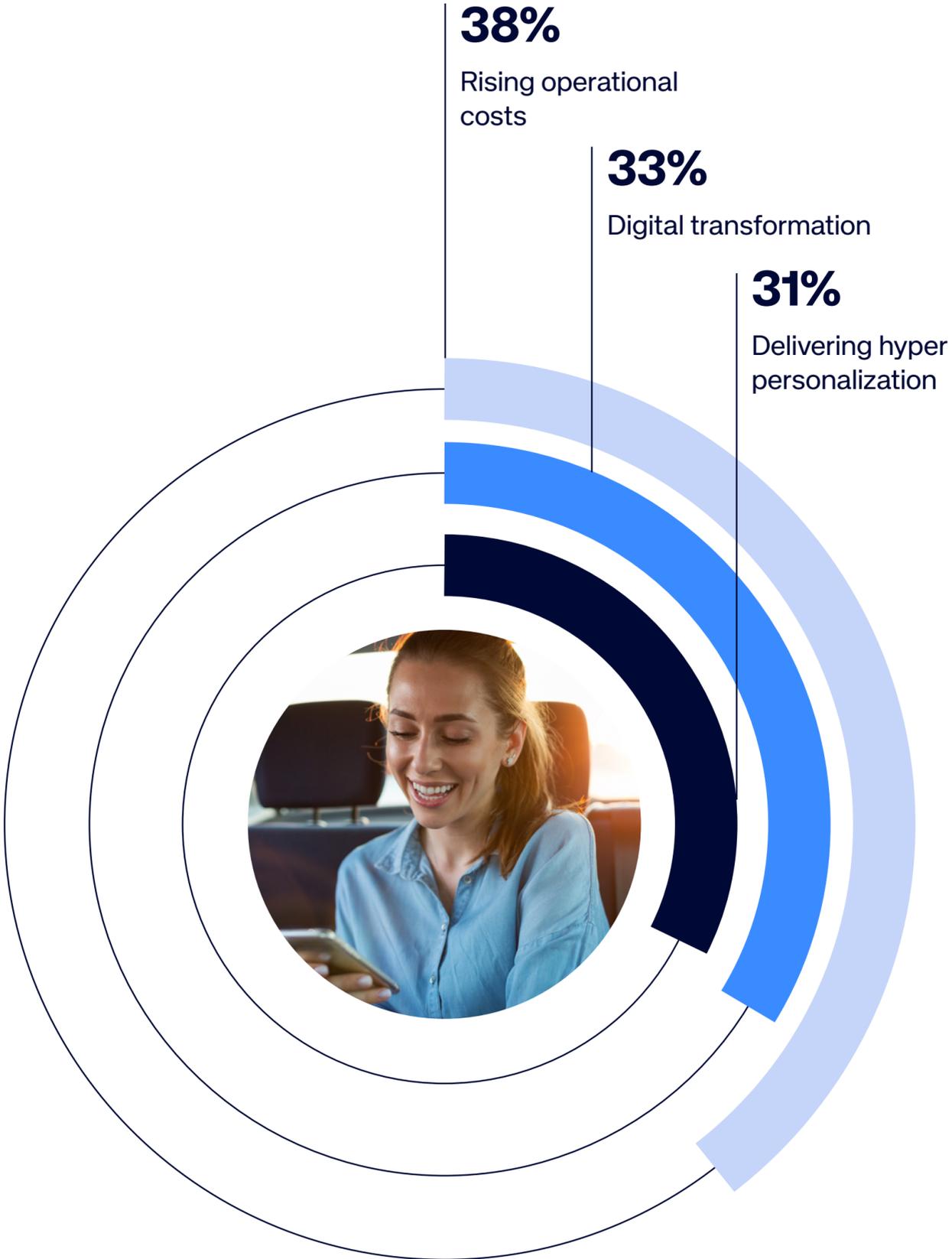
Turning to DMOs, macroeconomic concerns take precedence.

"The current economic situation will continue to pose a challenge to tourism recovery. The increase in trade tariffs, high inflation and interest rates, and volatile oil prices could affect tourists' travel decisions.

Rising fuel prices for airlines could have a direct impact on passengers as they will be seeing an increase in ticket prices. Transport and accommodation prices could also remain elevated due to inflation. This will make tourists continue to seek value for money and take short-distance trips closer to home."

Spokesperson
Tourism Malaysia

There is also opportunity buried within volatility.

"Changing global conditions demand a more adaptable structure than ever before, one that can make quick decisions and execute them rapidly.

To boost the resilience of our tourism industry, we are working to diversify markets, promote a range of products across different destinations tailored to each target market, and maintain year-round tourism activity nationwide. Through these efforts, we are not easily affected by challenges; rather, we have built resilience against all kinds of obstacles."
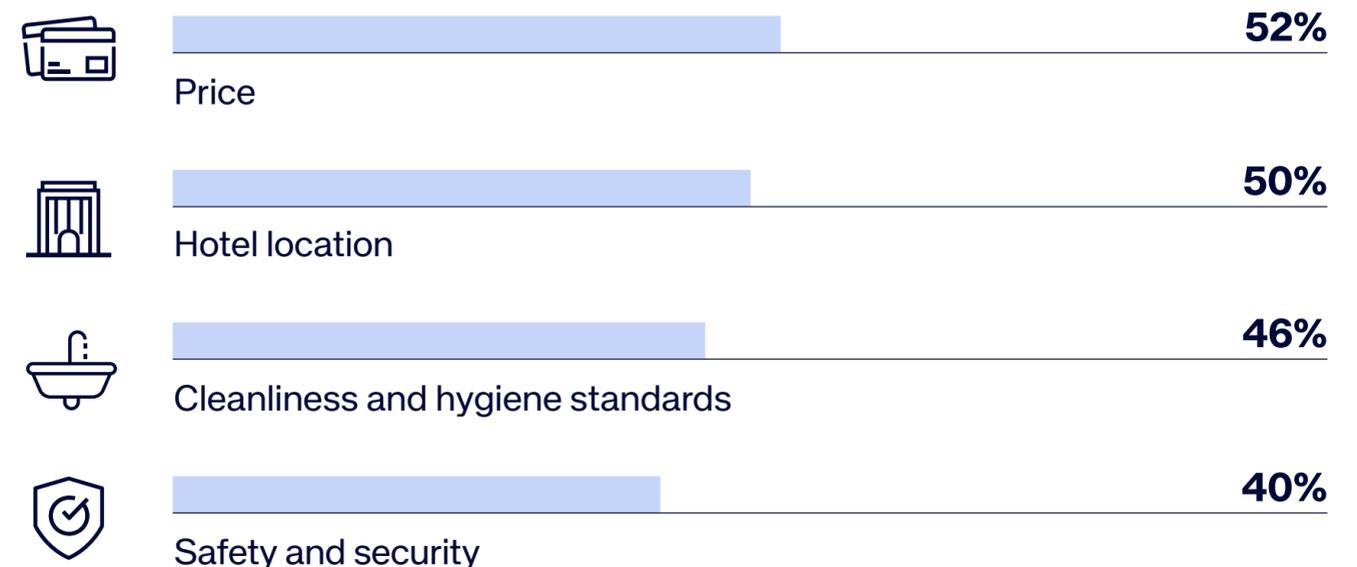
Sinan Seha Türkseven
General Manager, Türkiye Tourism Promotion & Development Agency

How are the expectations of travelers changing?

How do travelers themselves feel in 2026? Expectations have remained remarkably consistent, with non-negotiable fundamentals continuing to dominate hotel choice.

When choosing a hotel, which of the following factors are most important to travelers?

Price **52%**

Hotel location **50%**

Cleanliness and hygiene standards **46%**

Safety and security **40%**

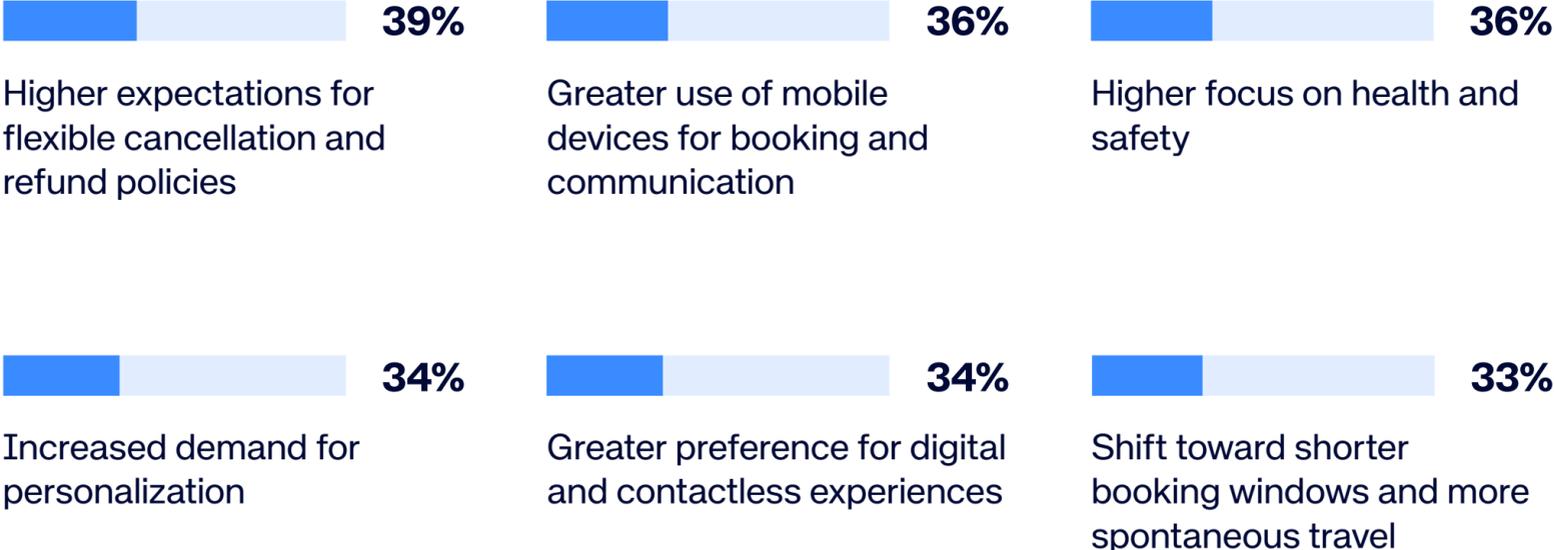# However, expectations around how these basics are delivered have shifted.

"Different market segments can have very different expectations. A corporate traveler may be looking for a good shower, flexible booking and check-out, a nice meal and then to leave – and the length of stay may just be one night. They arrive after a meeting, do not want to queue – they want a quick, efficient experience to be in the room.

"Leisure guests have different needs. They take time; they want to relax and enjoy the recreational facilities across properties, the pools, and spas. The service hoteliers offer must be tailored to the needs of the guest."

Tamer Habib
Chief Operating Officer, Amora Hotels & Resortsy

Hoteliers were asked - how do you think guest behavior has evolved in the past five years?

39%
Higher expectations for flexible cancellation and refund policies

36%
Greater use of mobile devices for booking and communication

36%
Higher focus on health and safety

34%
Increased demand for personalization

34%
Greater preference for digital and contactless experiences

33%
Shift toward shorter booking windows and more spontaneous travel

Key takeaways

Expectations are shifting toward **flexible, mobile-first, and personalized experiences.**

Rising costs and digital transformation are the biggest pressures facing hoteliers in 2026.

Improving **guest satisfaction** and finding **new revenue streams** are top hotelier priorities.

Travelers continue to **prioritize** price, location, cleanliness, and safety.
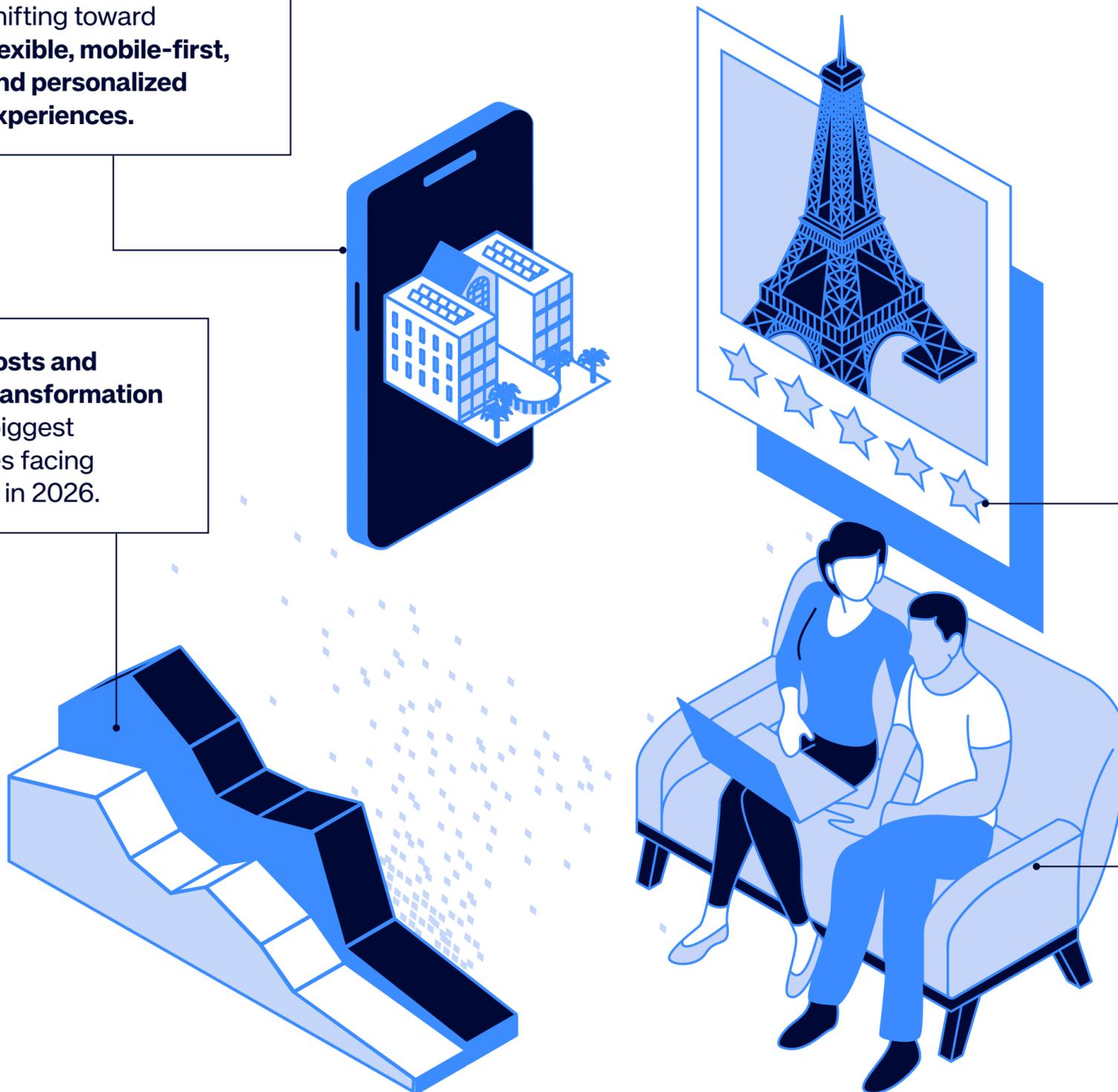
Part II

Winning the guest and turning travel demand into destination value

Part I explored the challenges hoteliers face and the changing expectations of travelers – but where are the opportunities this year and how can better use of data help?

Travelers told *Travel Dreams 2026* researchers they wanted more than just sightseeing from a trip – they want vacations that let them fully disconnect, recharge their mental health, and feel alive. They seek freedom and open itineraries, meaningful connections with local culture, and opportunities to explore new places, all while feeling safe and indulged.

It is clear that new perspectives and opportunities for personal growth presented by a destination, hotel, or experience are increasingly important for travelers from all locations and age groups.

## Which sensation makes travelers feel like they have hit their dream destination?

32%
When I stop checking my phone as real life is more interesting

16%
When a photo looks like it belongs on a magazine cover, without filters

15%
When I get to prioritize self-care without guilt

10%
When I instantly Google 'cost of living' because I want to relocate

9%
When I cry at the airport because I don't want to go home
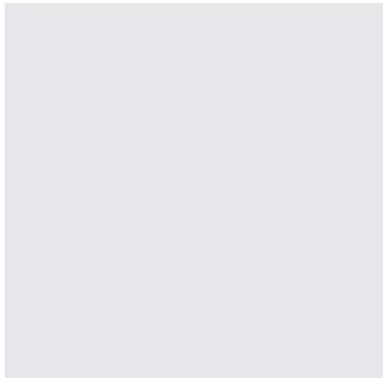
29%
Freedom
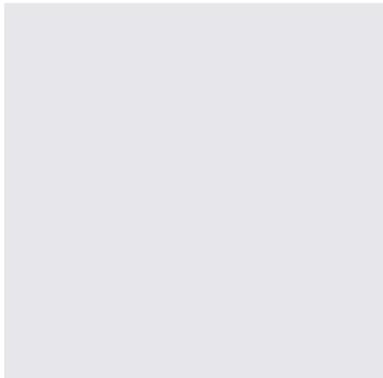
Just give me space, beautiful views and an open itinerary

24%
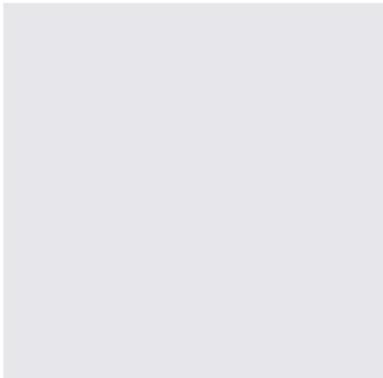**Connection to a locality**

Food, experiences, and special moments

22%
Discovery

I want to explore new places

17%
Ease

No decisions, no waiting in lines, or need for planning

6%
Achievement

Let me conquer a mountain or a yoga pose

When asked which emotion best describes how they want to feel at a hotel during their next international trip, the largest numbers of travelers went for

→ Safe **25%**

→ Recharged **18%**

Globally, 'indulged' was third, with large geographical swings between China (where 38% of travelers selected this as the top priority) against just 4% of travelers surveyed in India.

How about travelers returning from a trip? 'A sense of calm' (41%) was a priority for many, while a 'deeper sense of self' (18%) was second, rising to **39% among travelers surveyed in China.**

When visiting a destination for a holiday, what do travelers hope to have when they return?

41%
A refreshed brain and a calmer nervous system

18%
A new version of myself: clearer, lighter, more intentional

13%
Increased confidence and independence

7%
A story that's so extreme my friends think I'm exaggerating

6%
An improved social media profile with photos to make friends jealous

4%
A new hobby that I can be proud of
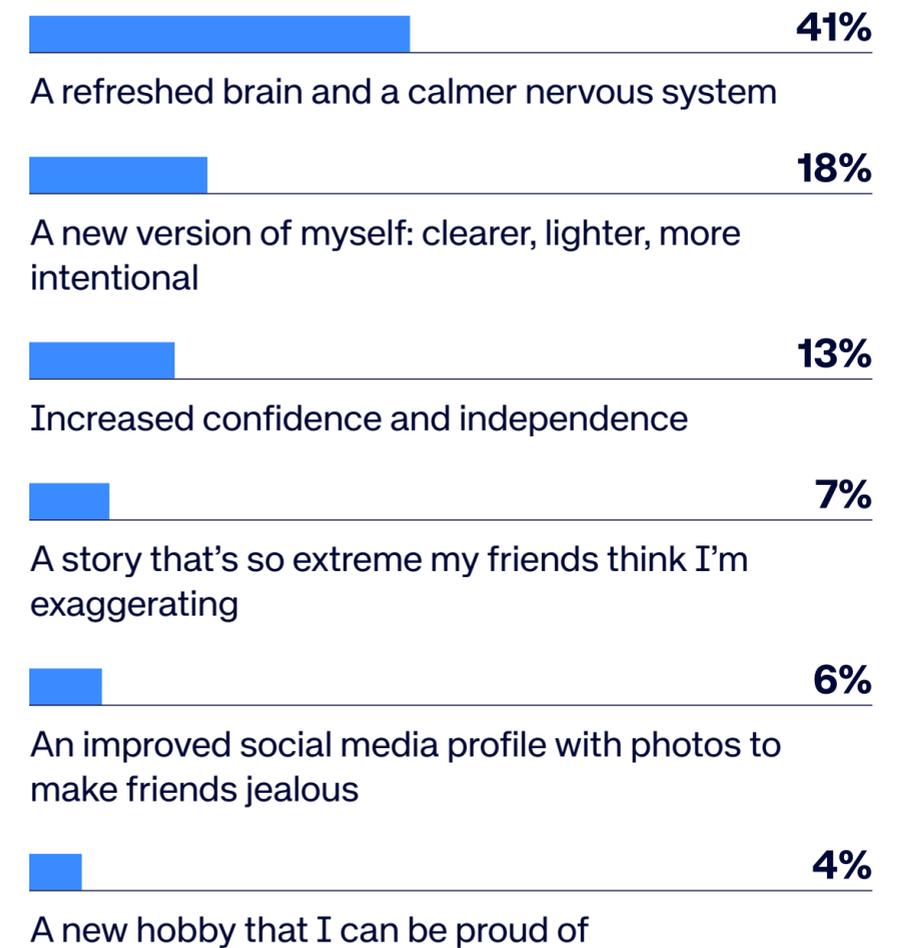
"The Travel Dreams 2026 research shows us the variations in what people are looking for and the importance of understanding target audiences when launching a marketing campaign or serving their needs on the ground.

Travelers want personalized, flexible, and emotionally satisfying experiences, which vary by age and background. Using data and technology wisely is essential to understand who guests are, what they want, and when they want it, enabling hotels to reimagine the guest journey and deliver meaningful, tailored stays without overcomplicating operations."

Dan Ciocoiu,

Head of Travel Media, Amadeus

How are hoteliers measuring success in 2026?

Travel Dreams 2026 research finds hoteliers are focused on the changing needs of guests this year, with 'greater guest satisfaction/loyalty' (14%) sitting alongside all important 'increased revenue per available room (RevPAR) or revenue per available guest (RevPAG)' (14%) as the key routes to profitability gains. 'Growing direct bookings' (8%) is also not the priority often assumed.

"With reviews growing more influential than ever, hoteliers indicated that exceeding guest expectations is essential. Hoteliers also see monetizing existing offerings and attributes, such as room views, amenities, or flexible check-in, as a meaningful opportunity to drive incremental loyalty and revenue, often without requiring major capital investment.

"At the same time, there is growing confidence in AI and technology to improve both day-to-day operations and marketing effectiveness, alongside better forecasting and price optimization."

Peter Waters
Global Head of Product, Hospitality, Amadeus

What do hoteliers believe presents the greatest opportunity to improve profitability in 2026?

14%
Improve guest satisfaction and build stronger loyalty

14%
Increase revenue per available room (RevPAR) or revenue per available guest (RevPAG)

12%
Monetize offerings or attributes

9%
Leverage AI and technology to improve day-to-day operations

9%
Leverage AI and technology to improve marketing efforts

9%
Improve forecasting and price optimization

8%
Grow the share of direct bookings

When it comes to measuring success, hoteliers take a balanced view, placing equal emphasis on financial performance (33%) and the guest experience (33%), recognizing, too, the importance in 2026 of online commentary from either influencers or guests.

For many hoteliers, data continues to be a thorn in their side, with 39% revealing they can struggle to access 'forward-looking and competitive data' that can directly inform strategy. 'Competitor insights' (36%) and 'actionable guest data' (33%) are also among the biggest gaps, pointing to ongoing challenges in turning fragmented data sources into timely, decision-ready intelligence.

"When it comes to data, we work to acquire raw data, including from Amadeus, and then internally manage this to generate insight. Comparing different sources of data, as well as our own information and surveys, allows us to compare and contrast, creating a stronger overview. This provides us with valuable information to develop business cases and understand what is happening within the market.

We use this data to explain the decisions we take to different stakeholders across the destination. Our work is driven by rational insight – and this is strategically very important."

Rodrigo Esponda Cascajares
Director General, Los Cabos Tourism Board

What do hoteliers consider the most effective ways to measure the success of a hotel business?

33%
Key performance indicators[1]

33%
Guest satisfaction scores (e.g. Net Promoter Score)

31%
Online visibility of your property (e.g. social or influencer mentions)

25%
Online guest reviews

[1] Such as earnings before interest, taxes, depreciation and amortization (EBITA), average daily rate (ADR), and revenue per available room (RevPAR)

"We collaborate with the leading data providers in the industry, including Amadeus Demand360®, which offers us the critical insights we need to make smarter decisions. By integrating these sources with our own proprietary data, developed and refined over more than a decade, and leveraging new AI capabilities, we are able to transform information into truly actionable insights.

"The key is turning data into meaningful knowledge. AI is exceptional at enabling this. It allows us to move beyond traditional spreadsheets and static reports, giving us precise, market-specific insights. In many ways, it empowers all of us to become analysts who can better anticipate what is ahead. This gives us a decisive competitive edge: the ability to move more quickly and confidently than our competitors."

Fernando Vives
Chief Commercial Officer & Management Board Member, Minor Hotels Europe & Americas

Which types of data are most difficult for hoteliers to access in a way that meaningfully impacts business decisions?
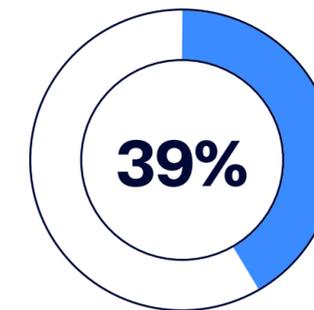
39%
Forward-looking performance metrics
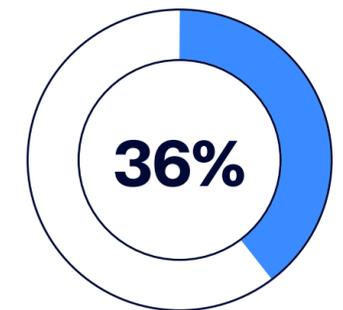
36%
Competitor performance data (e.g. pricing, booking or occupancy)
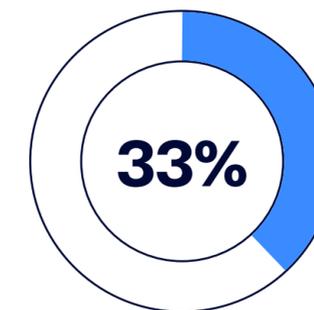
33%
Guest data (e.g. demographics, preferences or past stay history)
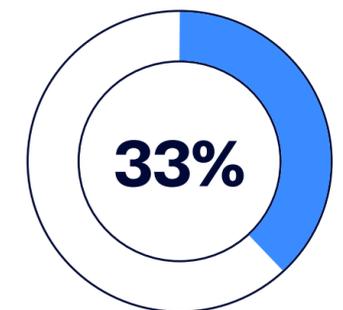
33%
Digital marketing performance (e.g. campaign return on investment or conversion)

31%
Traveler purpose data (e.g. business vs. leisure segmentation)

28%
On-property spend and ancillary revenue insights

Travelers placing significant trust in AI to inspire, plan and book journeys

The path to guest satisfaction starts long before arrival. It begins with being found, being chosen, and being trusted. In 2026, *Travel Dreams* survey data found **hotels are moving from traditional marketing to integrated, tech-powered demand generation, fueled by data, personalization, and modern digital experiences – while AI is also playing an increasing role.**
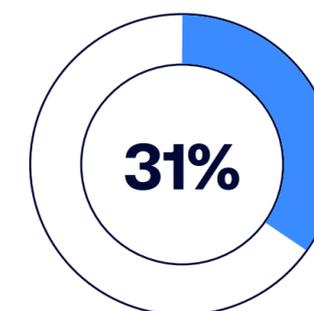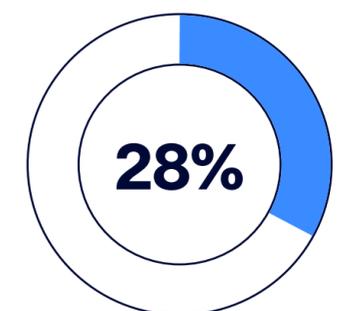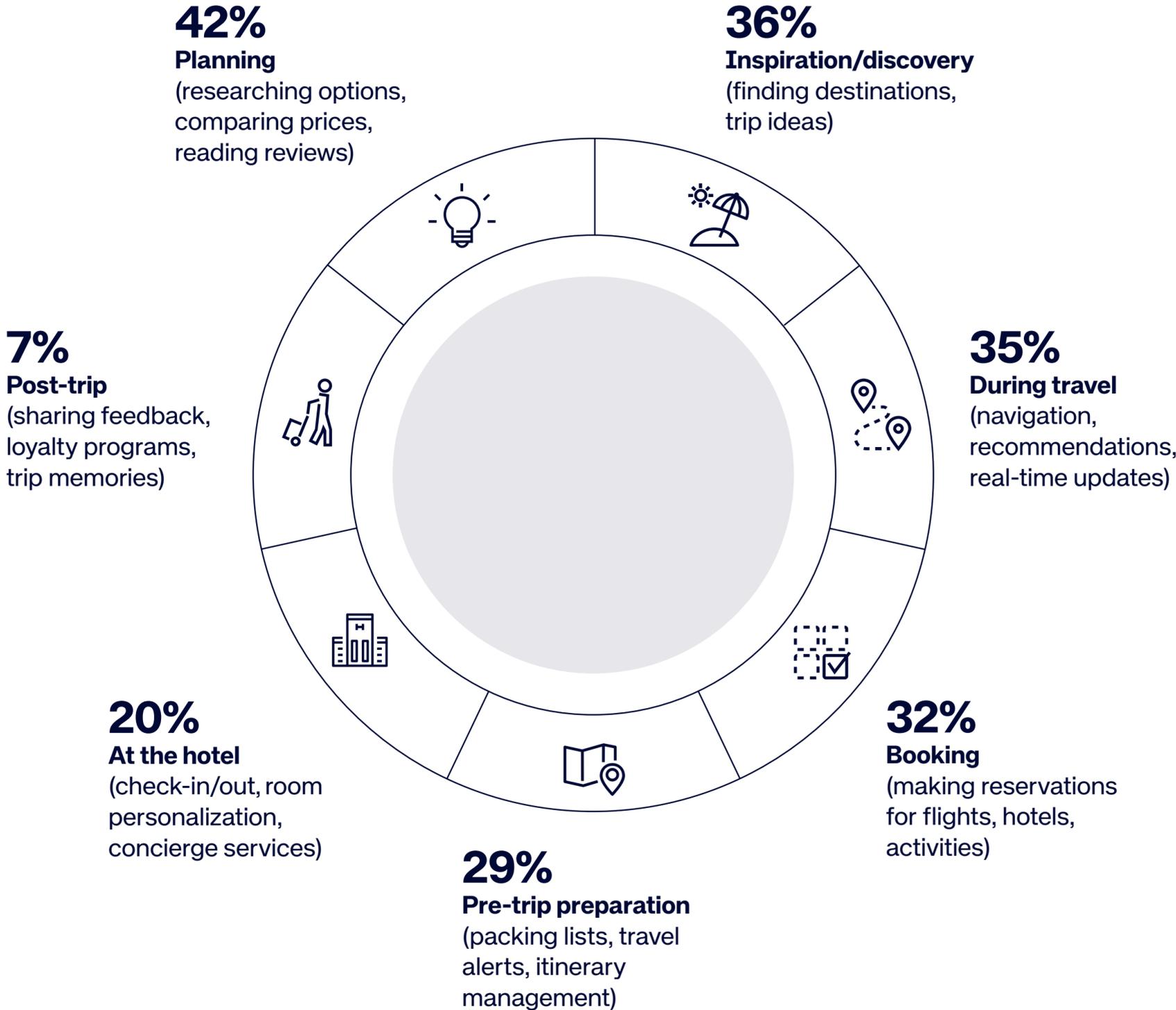
Today, travelers find AI to be useful at every step of the journey. However, one in five leisure travelers say they do not find AI helpful at any stage, four times more than business travelers (5%).

Among leisure travelers and business travelers who extend a trip to spend leisure time at their destination, friends and family recommendations are still the top source of inspiration for a travel destination today, almost unchanged from when asked to remember preferences five years ago (37% today compared to 36%).

At which stages of the experience would travelers find AI-powered tools or services most helpful?

42%
Planning
(researching options, comparing prices, reading reviews)

36%
Inspiration/discovery
(finding destinations, trip ideas)

7%
Post-trip
(sharing feedback, loyalty programs, trip memories)

35%
During travel
(navigation, recommendations, real-time updates)

20%
At the hotel
(check-in/out, room personalization, concierge services)

32%
Booking
(making reservations for flights, hotels, activities)

29%
Pre-trip preparation
(packing lists, travel alerts, itinerary management)

However, other forms of inspiration have shifted, including AI. When asked by *Travel Dreams 2026* researchers to recall preferences from five years ago, only 6% of travelers surveyed used chatbots to inspire their journey, while today this figure has tripled to 18%.

Chatbots are now on par with 'celebrities and travel influencers' (18%) and have overtaken 'travel agents with a physical presence' (14%) and 'newspapers' (13%) when it comes to deciding where to go.

69%
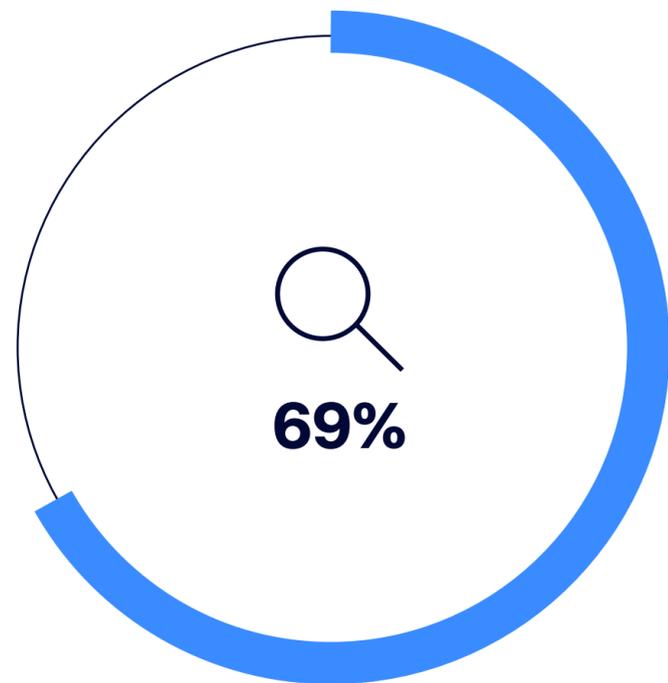
of travelers are confident that AI summaries provide enough detail for an informed choice without any further investigation necessary.

Travelers' confidence

↑ India 87%
↑ China 86%
↓ UK 59%
↓ Australia 59%
↓ Germany 52%

Moreover, those who trust AI are willing to offer the technology significant leeway.

12% of travelers surveyed had no hesitations using AI for travel recommendations (a figure highest among Gen X travelers, at 16%).

However, among those that were concerned by risks:

17%
Consider data privacy a top issue with using AI

Only 5%
of those surveyed said they were unsure how it worked

15%
felt that they may be missing out as the AI only shows options based on known preferences.

At the same time, hoteliers and DMOs are reporting that getting generative engine optimization (GEO) and search engine optimization (SEO) right, appearing in the AI summaries and reaching people online, is the most critical part of their strategy to drive customer demand in 2026.

What are the top ten strategies that are most important for hoteliers in driving customer demand in 2026?

38%
Optimizing traffic in traditional search engines (SEO) and AI platforms (GEO)

37%
Investing in analytics and technology (customer relationship management (CRM) and marketing automation)

35%
Integrating AI-powered marketing and personalization

33%
Upgrading website and mobile experience

31%
Optimizing presence on 3rd party channels (GDS, OTA)

30%
Digital advertising and paid search campaign

28%
Influencer campaigns to drive awareness of your hotels

27%
User-generated social media campaigns

25%
Post-trip engagement and offers

24%
Events/tradeshows and awards

Key takeaways

Demand growth is being driven by SEO/GEO, AI-powered marketing, data, and improved digital experiences.

Data gaps remain a major barrier, especially around forward-looking, competitor, and actionable guest insights.

Hoteliers see profitability coming from **higher RevPAR and stronger guest loyalty**, supported by smarter use of assets and technology.

Success is measured equally by **financial performance and guest satisfaction**, alongside online visibility and reputation.

Travelers increasingly trust AI for planning and inspiration, while seeking emotionally rewarding, flexible, and personalized trips.