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Amadeus Insights

Travel Dreams 2026

From data to delight

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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 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 rising in 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.

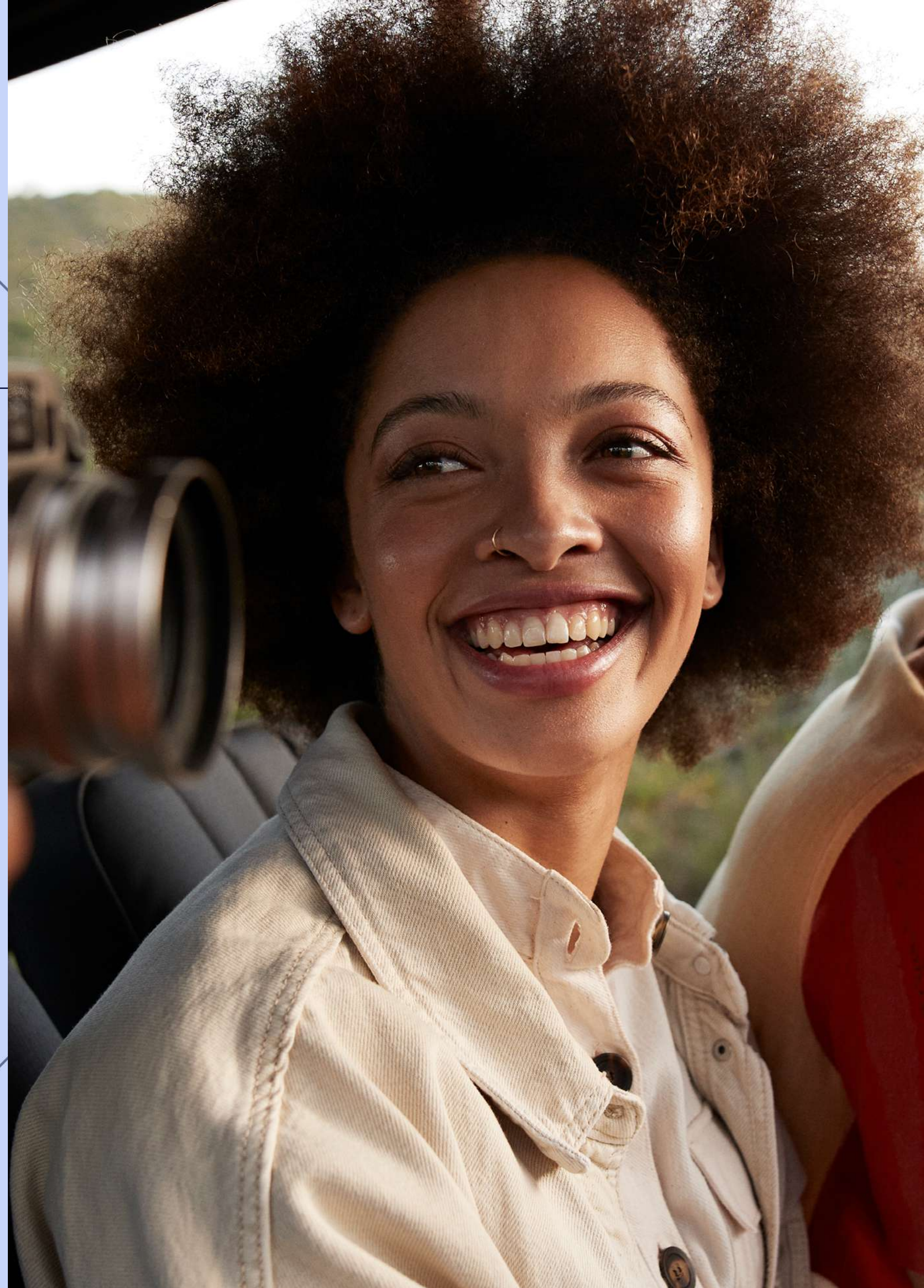
For DMOs, the priority is converting digital demand into destination value, using data to target and diversify markets, and maintaining balanced year-round tourism activity. Travelers are clear on what they prize in their perfect destination, seeking mental wellbeing, open spaces, freedom, beautiful 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 report pressure to transform from many different directions.

When asked about the top challenges for the year ahead, 'rising operational 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.

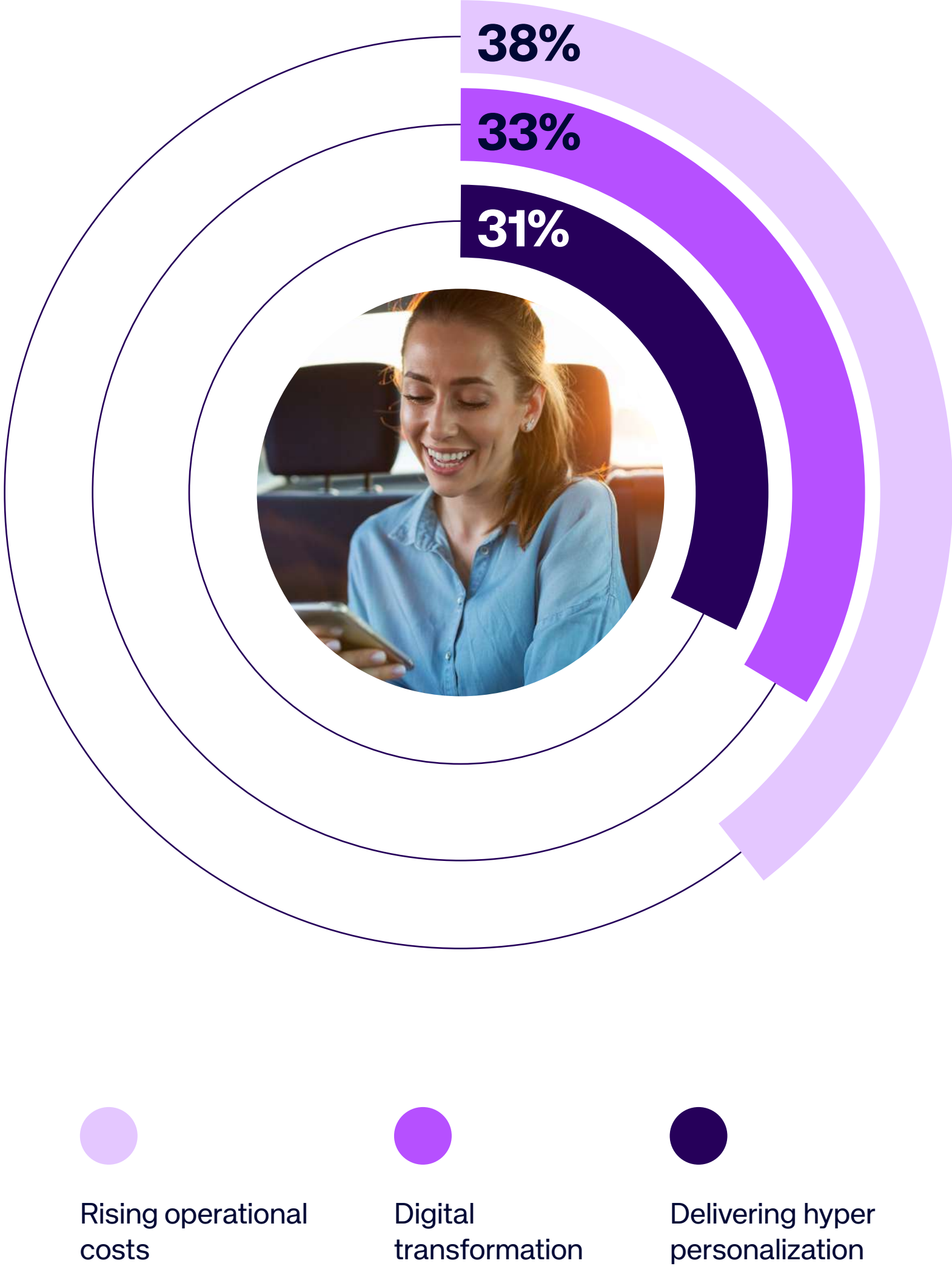
Asked specifically about the property they represent, hoteliers pointed to 'improving guest satisfaction' (33%) as their chief concern, ahead of even 'generating higher or more profitable demand' (27%).

Guest experience is key.

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



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



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.”

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

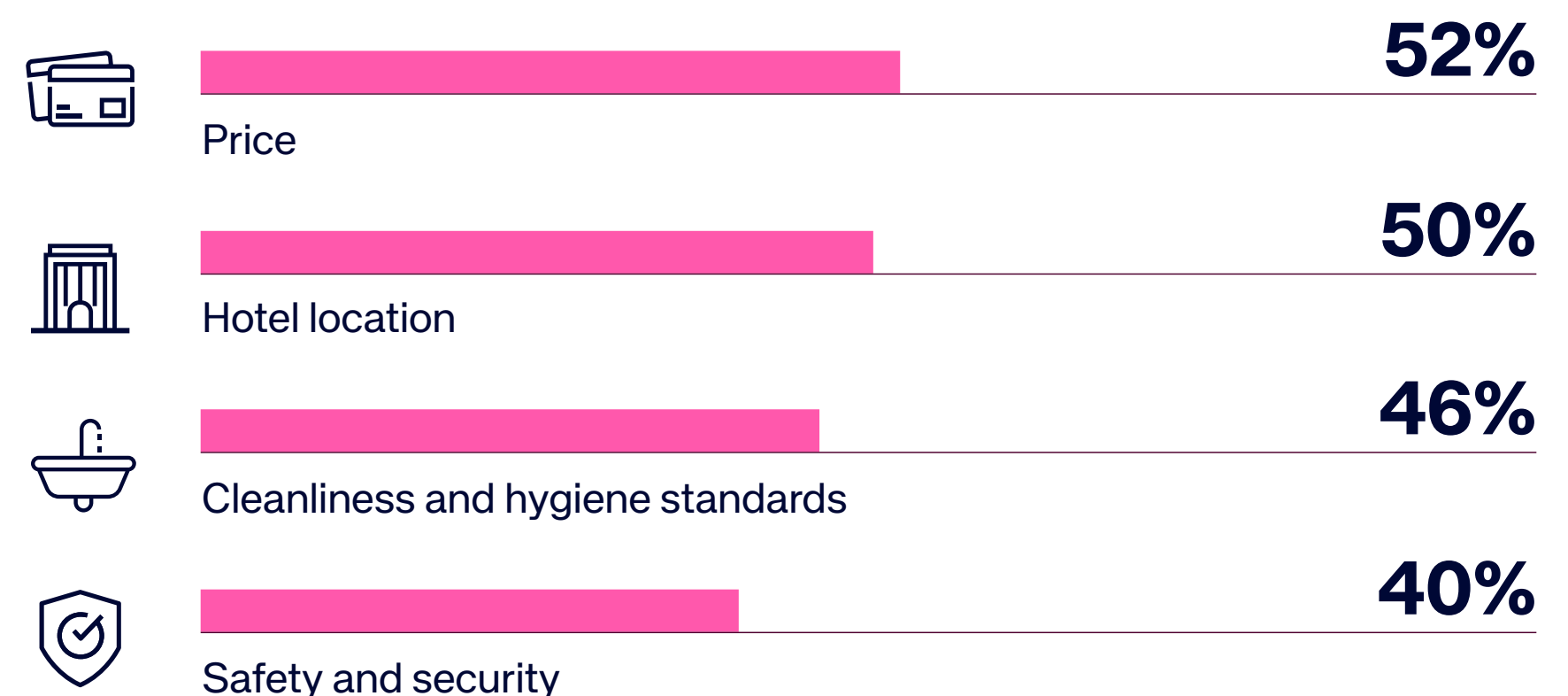
General Manager, Türkiye Tourism Promotion & Development Agency

How are the expectations of travelers changing?



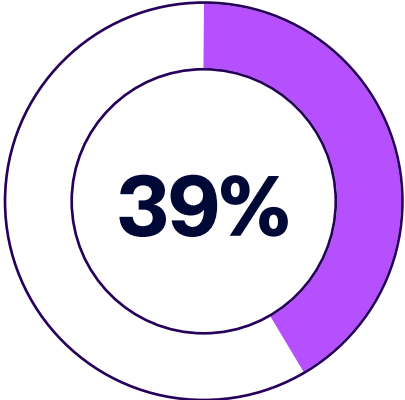
How do travelers themselves feel in 2026?
Expectations have remained remarkably consistent, with non-negotiable fundamentals continuing to dominate hotel choice.

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

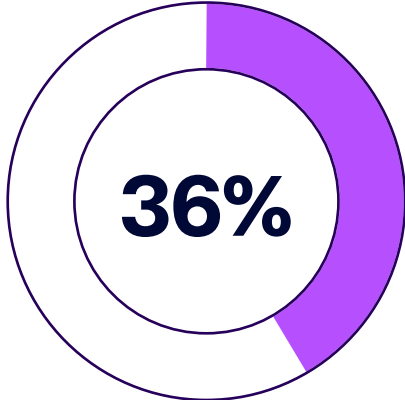


However, expectations around how these basics are delivered have shifted.

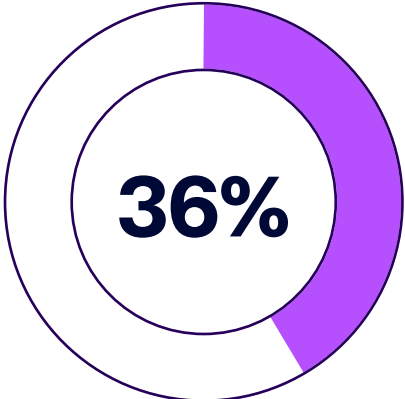
Hoteliers were asked - how do you think guest behavior has evolved in the past five years?



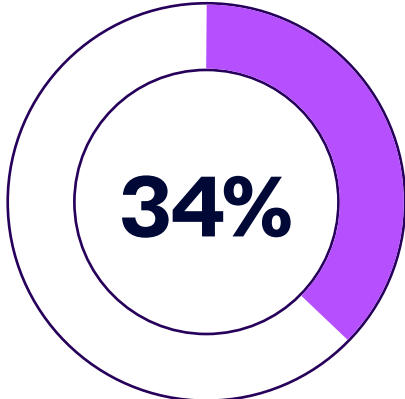
Higher expectations for flexible cancellation and refund policies



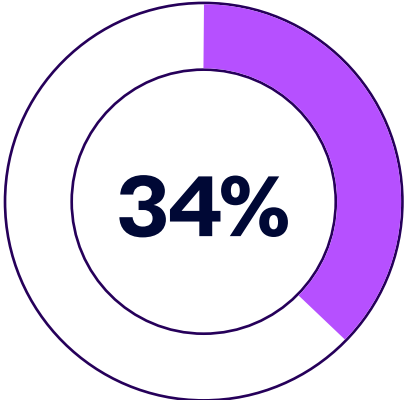
Greater use of mobile devices for booking and communication



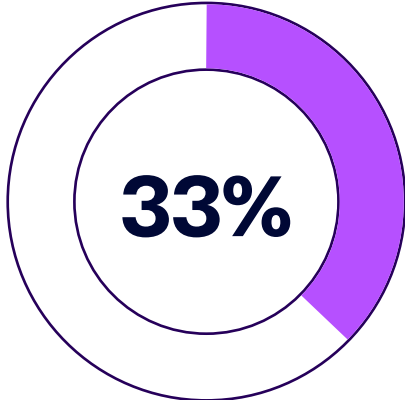
Higher focus on health and safety



Increased demand for personalization



Greater preference for digital and contactless experiences



Shift toward shorter booking windows and more spontaneous travel



“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 & Resorts

Key takeaways

01

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

02

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

03

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

04

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

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

When planning a holiday, what is the feeling travelers are seeking from a destination?



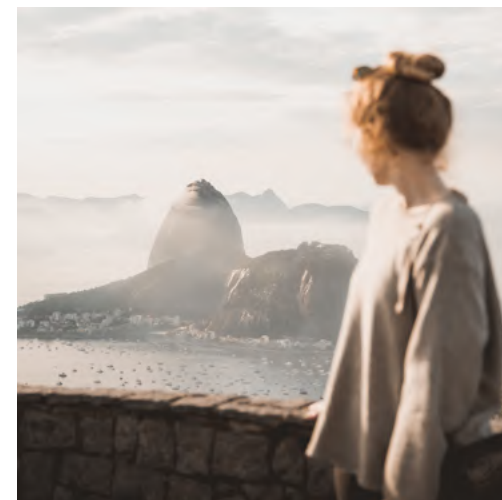
29%
Freedom

Just give me space, beautiful views and an open itinerary



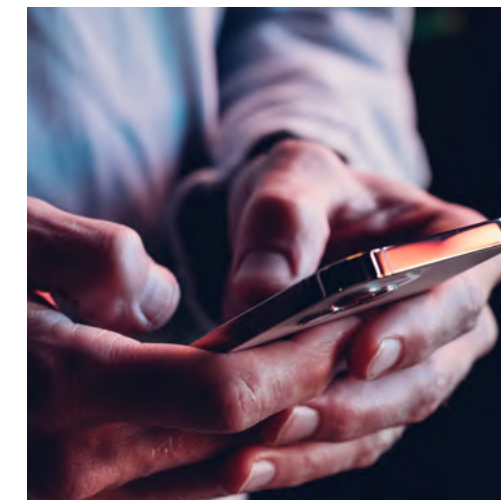
24%
Connection to a locality

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



“Destination management organizations are today architects of how a location makes a traveler feel during a vacation. *Travel Dreams 2026* data reveals travelers now want freedom, connection, discovery, and ease. They want to disconnect from their phones, recharge their mental health, and feel genuinely alive, not just tick off landmarks. Those who intentionally craft journeys that deliver personal growth, wellbeing, and authentic connection will become indispensable partners to hotels, brands and destinations alike.”

Sol Freixa

Vice President, Commercial, Destinations, Amadeus



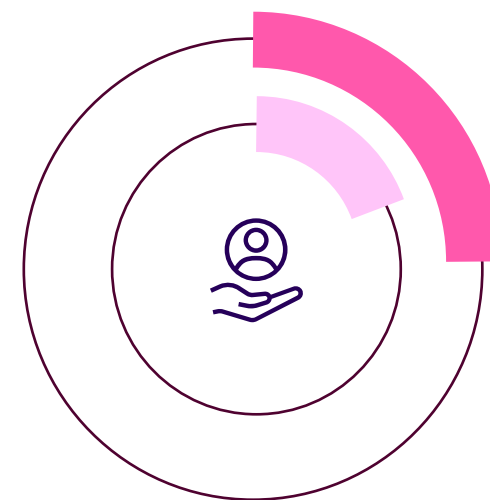
“We identify and understand our target audiences through extensive global research, segmenting global travelers into distinct profiles based on their motivations and behaviors, and identifying the size and opportunity of these segments in each of our 25 key source markets.

We then build detailed profiles for each, tracking everything from their preferred travel months and accommodation style to their media consumption habits and what they value most in a destination, such as safety or climate. The resulting playbooks are a key component of our research and part of a wider, continuous program of data analysis and market intelligence that informs our strategic decisions, allowing us to tailor marketing, partnerships, and product development.”

Abdulla Yousuf

International Operations Director at the Department of Culture & Tourism – Abu Dhabi

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



25%
Safe

18%
Recharged

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?





“

“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 Advertising Solutions, 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.



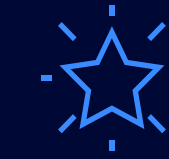
“With reviews growing more influential than ever, hoteliers indicated that exceeding guest expectations is essential. Hoteliers also see monetizing existing offerings and attributes, such as room views, amenities, or flexible check-in, as a meaningful opportunity to drive incremental loyalty and revenue, 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.”

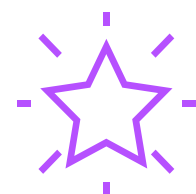
Rodrigo Esponda Cascajares
Director General, Los Cabos Tourism Board

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



33%

Key performance indicators¹



33%

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



31%

Online visibility of their 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)



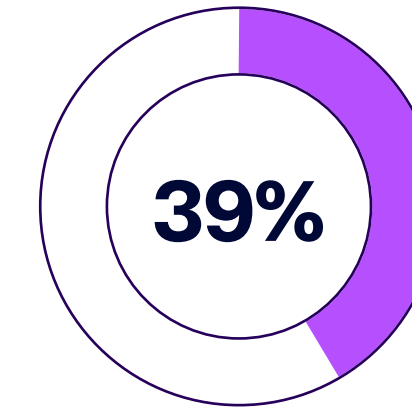
“We collaborate with the leading data providers in the industry, including Amadeus Demand360®, which offers us the critical insights we need to make smarter decisions. By integrating these sources with our own proprietary data, developed and refined over more than a decade, and leveraging new AI capabilities,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

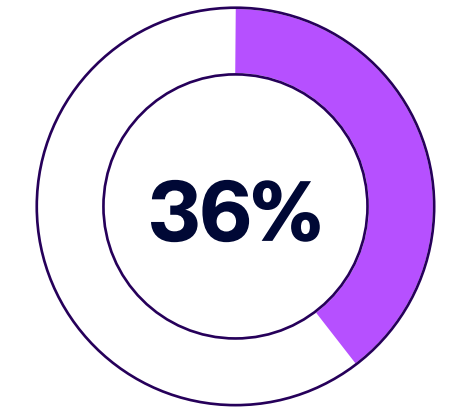
Fernando Vives

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

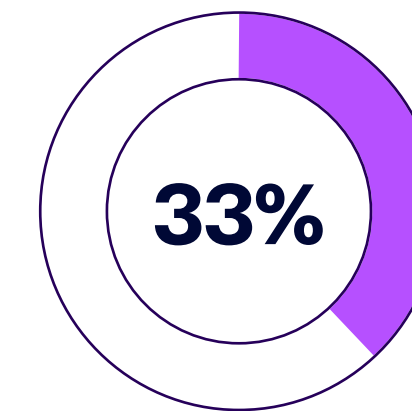
Which types of data are most difficult for hoteliers to access in a way that meaningfully impacts business decisions?



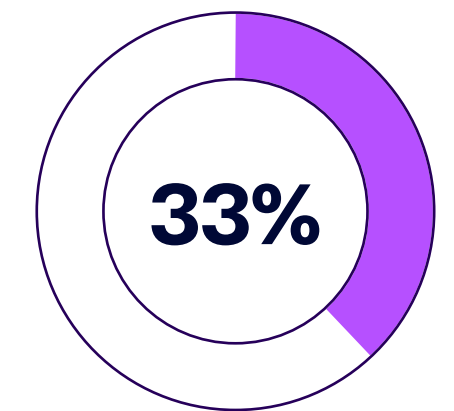
Forward-looking performance metrics



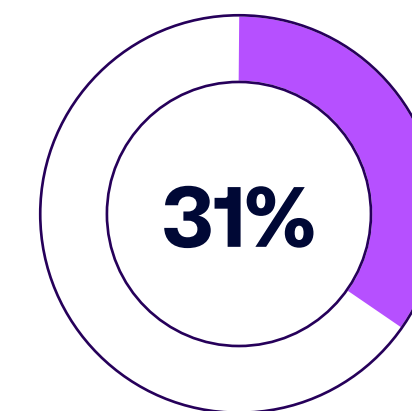
Competitor performance data (e.g. pricing, booking or occupancy)



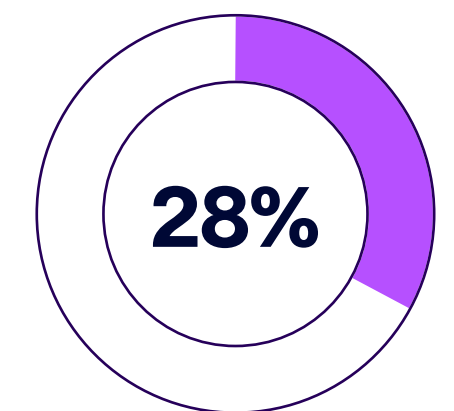
Guest data (e.g. demographics, preferences or past stay history)



Digital marketing performance (e.g. campaign return on investment or conversion)



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



On-property spend and ancillary revenue insights

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

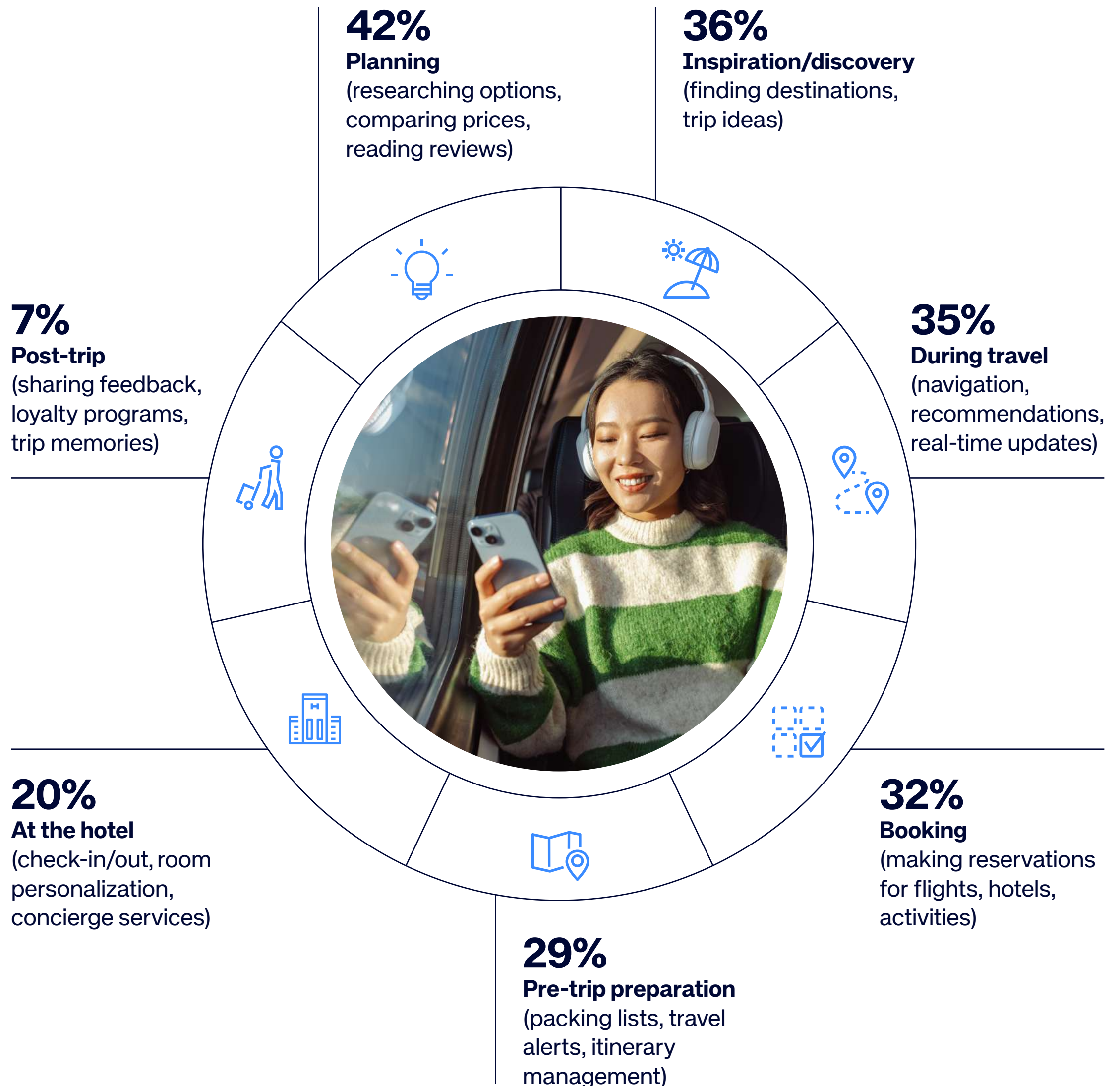


The path to guest satisfaction starts long before arrival. It begins with being found, being chosen, and being trusted. In 2026, Travel Dreams survey data found hotels are moving from traditional marketing to integrated, tech-powered demand generation, fueled by data, personalization, and modern digital 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%).

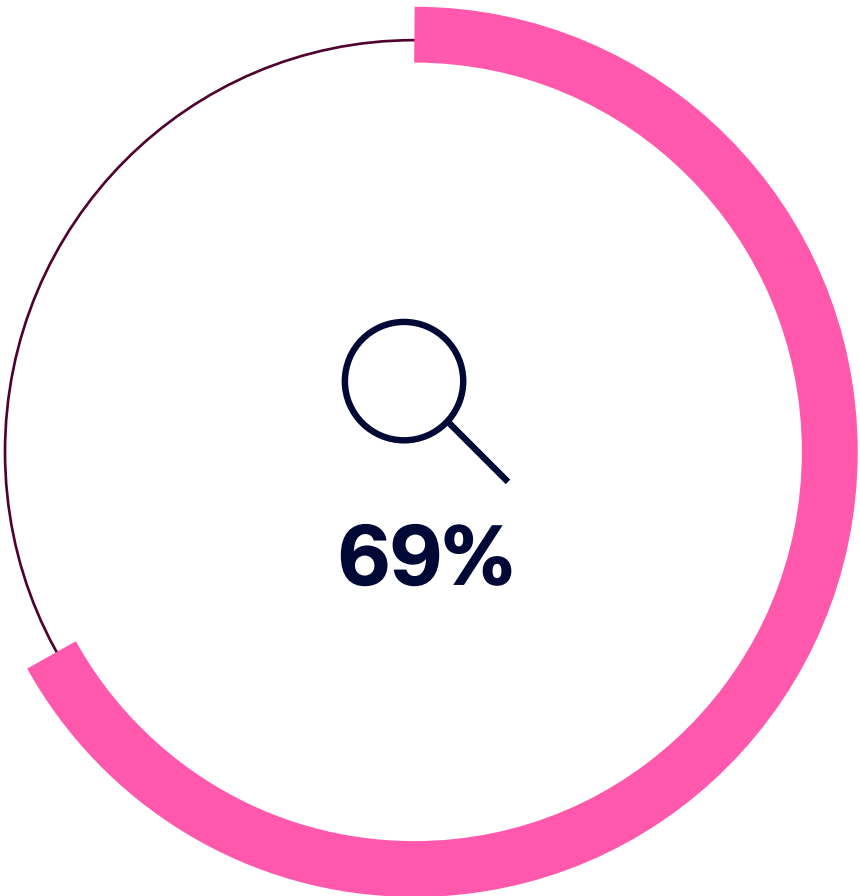
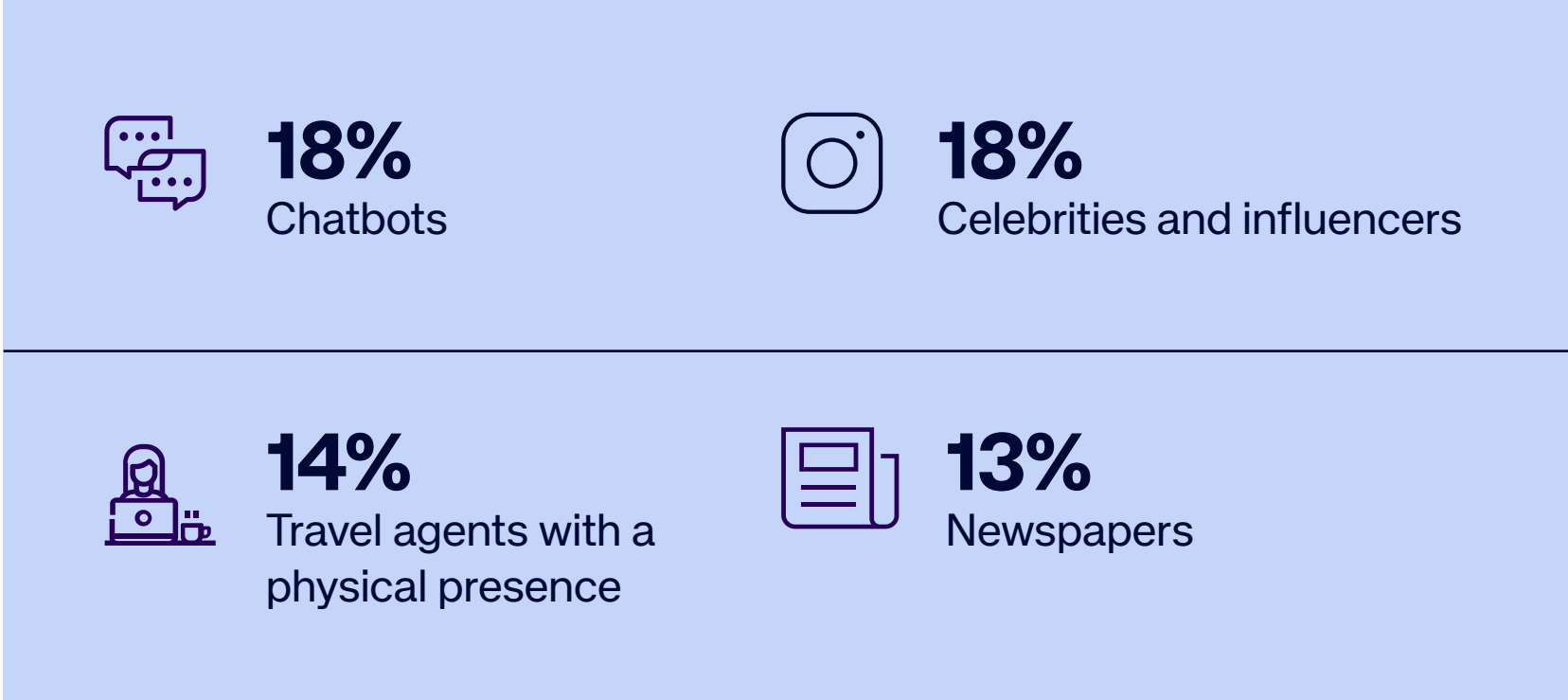
Among leisure travelers and business travelers who extend a trip to spend leisure time at their destination, friends and family recommendations are still the top source of inspiration for a travel destination today, almost unchanged from when asked to remember preferences five years ago (37% today compared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

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



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’ and have overtaken ‘travel agents with a physical presence’ and ‘newspapers’ 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
- 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?



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



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



Integrating AI-powered marketing and personalization **35%**



Upgrading website and mobile experience **33%**



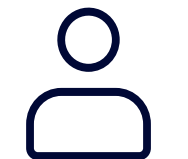
Optimizing presence on 3rd party channels (GDS, OTA) **31%**



Digital advertising and paid search campaigns **30%**



Influencer campaigns to drive awareness of your hotels **28%**



User-generated social media campaigns **27%**



Post-trip engagement and offers **25%**



Events/tradeshows and awards **24%**

Key takeaways

01

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

02

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

03

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

04

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

05

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



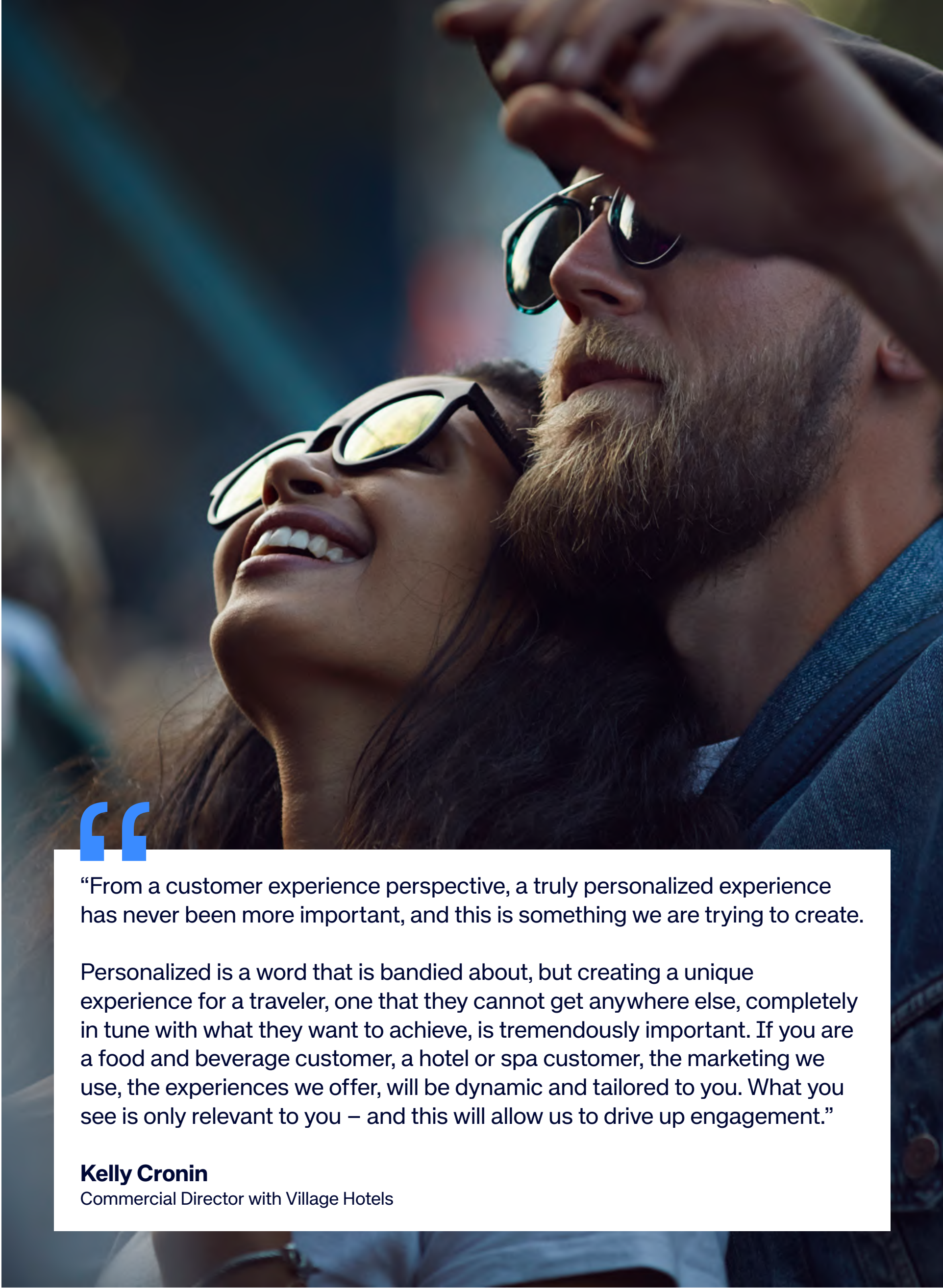
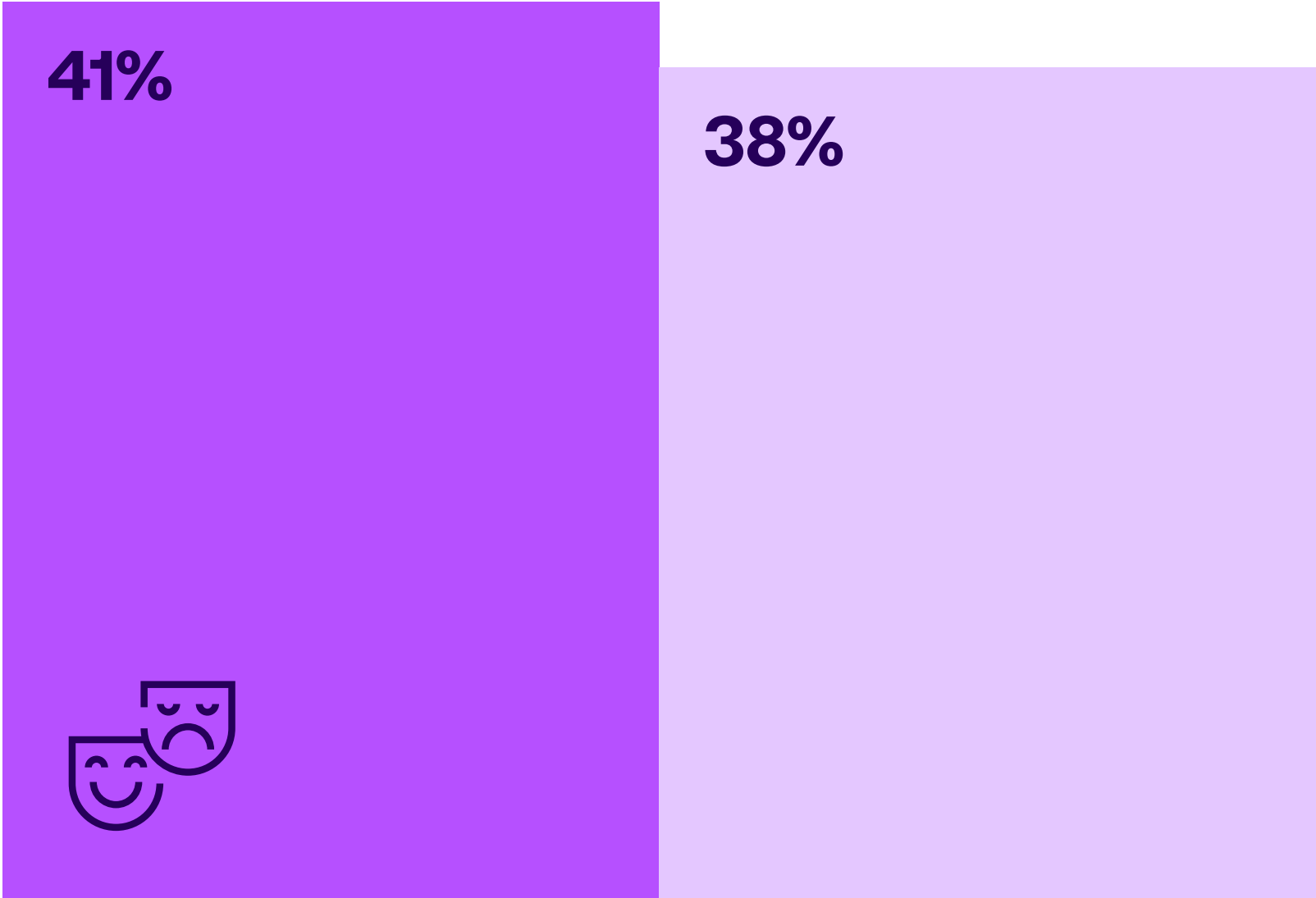
Part III

Deepening
understanding
to create
personalized
experiences



Travel Dreams 2026 survey results show hoteliers are responding to changing guest expectations, increasingly focusing on creating highly personalized experiences. Many are working to tailor stays through the creation of packages, technology-driven insights, and unique local experiences.

As anticipated by Amadeus Travel Trends 2026, 41% of hotels have **created packages for regional concerts, cultural events or that connect with popular TV shows**, while a further 38% plan to do so this year.



“From a customer experience perspective, a truly personalized experience has never been more important, and this is something we are trying to create.

Personalized is a word that is bandied about, but creating a unique experience for a traveler, one that they cannot get anywhere else, completely in tune with what they want to achieve, is tremendously important. If you are a food and beverage customer, a hotel or spa customer, the marketing we use, the experiences we offer, will be dynamic and tailored to you. What you see is only relevant to you – and this will allow us to drive up engagement.”

Kelly Cronin
Commercial Director with Village Hotels

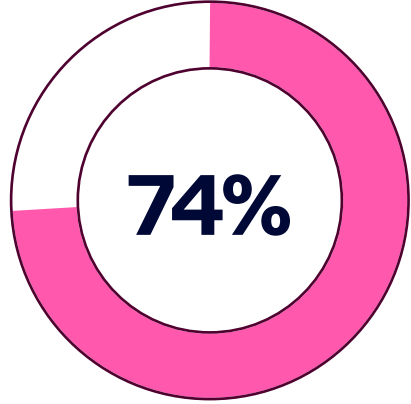
Attribute-based merchandising could generate an additional \$1 million a year for a mid-scale hotel by selling six specific attributes*

Investment in tailored stays could also create new opportunities to drive revenue – with 74% of global travelers saying personalization is important to them, with a quarter of surveyed travelers indicating they are looking for ‘pick and stay hotels,’ where they can select options from a wide variety of add-ons.

Analysis based on the spending appetite of global travelers reveals the revenue potential of the six most popular hotel attributes which, if monetized strategically, could generate \$1 million a year for a mid-scale property.**

As outlined below, top of the list are attributes that deliver time, control, and thoughtful comforts. These are potentially high-margin, high-uptake ancillaries that could be monetized across all guest segments. They would require minimal operational complexity and deliver immediate returns.

The following indicative analysis is calculated by first analyzing traveler appetite to pay for each attribute, as revealed by the *Travel Dreams 2026* survey, applied to sample pricing that could be introduced by a mid-scale hotel, with 150 guest rooms, and an average of 70% occupancy over a year. This illustrative model also assumes guests may purchase more than one attribute during a stay; actual performance will vary based on merchandising rules and operational constraints.**

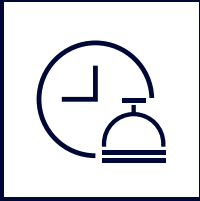


of global travelers saying personalization is important to them



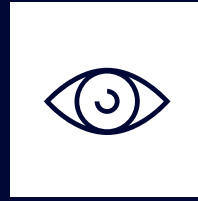
\$1 million
a year possibly generated for a mid-scale hotel by selling specific attributes





1. Early check-in/late check-out

(\$30 per trip) - if targeted correctly, has the potential to generate annual revenues upwards of **\$376,000**.



2. View or floor selection

(\$25 per trip) - has the potential to generate annual revenues upwards of **\$351,000**.



3. Personalized welcome amenities

(\$25 per amenity kit) - have the potential to generate annual revenues upwards of **\$266,000**.

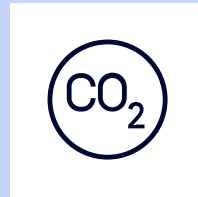
The survey results also reveal a second tier of strategic upsells with similarly significant revenue potential that hoteliers could consider. Each would achieve greater potential if targeting is supported by strong customer insight.



4. Sleep optimization packages

(including premium bedding, white noise devices and aromatherapy)

(\$30 per package) - have the potential to generate annual revenues upwards of **\$342,000**. This package was particularly attractive to Gen Z, where 88% said they would pay an additional fee for it.



5. Rooms with enhanced air quality

(featuring oxygen enrichment and air purification)

(\$40 per night) - have the potential to generate annual revenues upwards of **\$471,000**. Over 90% of travelers surveyed in China and India, many of whom live in cities affected by air-quality challenges, say they would pay extra for increased oxygen levels in their rooms.



6. Local experience kits

(including neighborhood guides and artisan souvenirs)

(\$20 per kit) - have the potential to generate annual revenues upwards of **\$243,000**. Just under a third (30%) of business travelers extending a trip for leisure said they would be prepared to spend over 15% more on top of their ADR for this kind of service.



“

Personalization has become a powerful revenue opportunity for hotels, with travelers increasingly willing to pay for tailored experiences. From simple, quick-to-implement options like early check-in, preferred views, and personalized welcome amenities to more advanced offerings such as local experience kits, sleep optimization packages, and enhanced air quality rooms, hotels can unlock significant incremental revenue with well targeted amenities.

For a typical mid-scale property, strategically monetizing these preferences has the potential to generate significant additional annual income while meeting clear and growing guest demand and growing connections with customers. Moreover, the full potential can be unleashed if a hotelier has a strong channel strategy and can capture the specific demand patterns per channel. Customers booking through partner channels have high potential to purchase incremental amenities if targeted directly and thus contribute to increased revenue per guest.”

Mirja Sickel

Executive Vice President, Hospitality Distribution, Amadeus

Where do hoteliers see the greatest potential for non-room revenue growth?



44%

Social events (e.g. weddings, celebrations or private events)



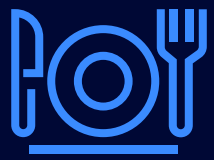
44%

Concierge and guided experiences (e.g. tours, culinary adventures or local attractions)



40%

Spa, fitness and on-site wellness packages



37%

Specialty restaurants or bars



36%

Partnerships with local businesses



36%

Corporate meetings and conferences

Hoteliers are also increasingly identifying opportunities to expand beyond the hotel walls and deepen connections with local communities and diversify income, turning properties into multi-purpose experience hubs. The strongest opportunities are seen in ‘social events and curated experiences’ (44%), alongside suggesting a shift toward monetizing moments and services, rather than relying solely on accommodation.



“Food is a real opportunity to grow The Ascott brand, especially when it comes to group travel. If there is a new opportunity for dining, either within or around our properties, this can drive occupancy. For example, we recently welcomed our elite members from Malaysia to Penang Island, where they went shopping in the local markets with a Michelin guide chef, followed by dinner and even durians. We try to tap into the attractions of a location or city – and then turn that into an experience for a guest.”

Tan Gan Hup

Vice President, Loyalty & Partnerships, The Ascott Limited



Realizing the value of group travel

Group travel was reported as a key component of hotel or DMO strategies in 2026.

Some 83% of hotels expect revenue from customer meetings and events – such as weddings or meetings – to increase over the next two years, with 28% anticipating revenue in this area to increase by up to 5%, 45% expecting growth of 6-15% and an optimistic 11% looking for growth of 15% or more.

83%

Of hotels expect revenue from customer meetings and events to increase over the next two years

45%

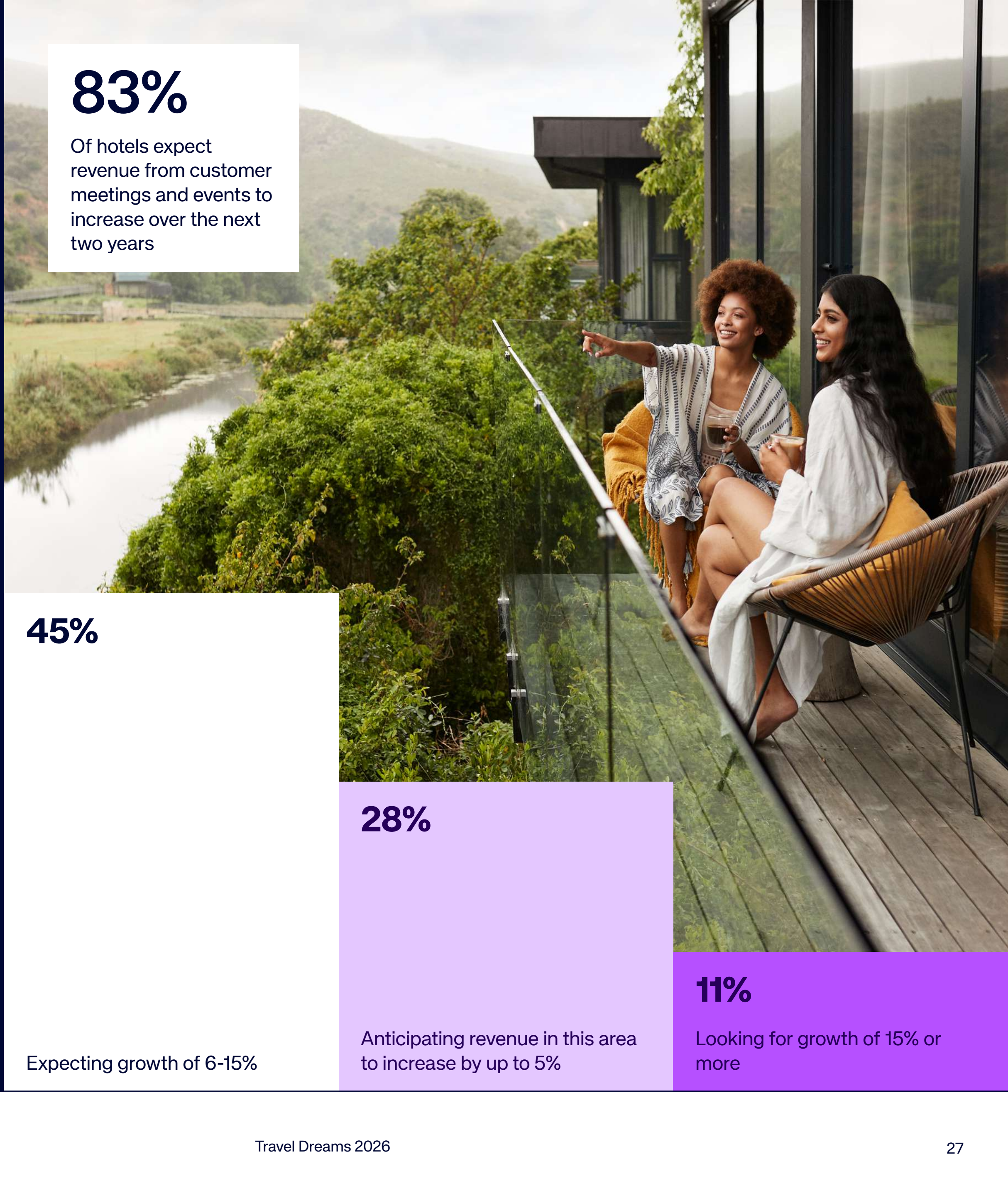
Expecting growth of 6-15%

28%

Anticipating revenue in this area to increase by up to 5%

11%

Looking for growth of 15% or more



“Groups and MICE bookings are a rapidly growing segment in our market, and we are currently redeveloping our properties to accommodate that demand.

“We are aiming to raise our group bookings to 25% of our sales, and Amadeus is contributing to this process. We have upped the ante on the way we book meetings, and we have deployed Delphi, which talks to the property management system (PMS) and revenue management systems through a two-way interface. This will help us automate these bookings and simplify the process.”

Daniel Earle

Vice President of Commercial Strategy, Grand Beach Hotel
Miami Beach

Key takeaways

01

Hotels are **evolving into experience hubs**, growing non-room revenue via events, wellness, and partnerships.

02

Top priority **room attribute preferences** – including early check-in, personalized amenities, and local experience kits - are revealed with potential revenue achievable.

03

Hotels are **doubling down on personalization** through packages, AI, contactless tech, and tailored local experiences.

04

Personalization is now a core revenue strategy, not just a service differentiator.

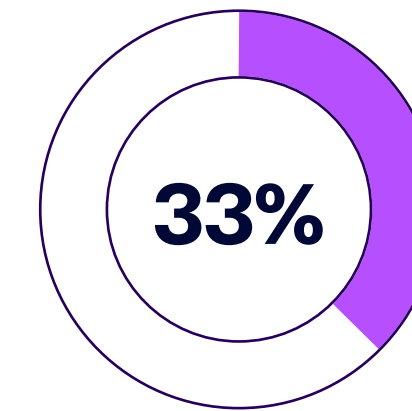
Part IV

The
transformative
engine of
technology

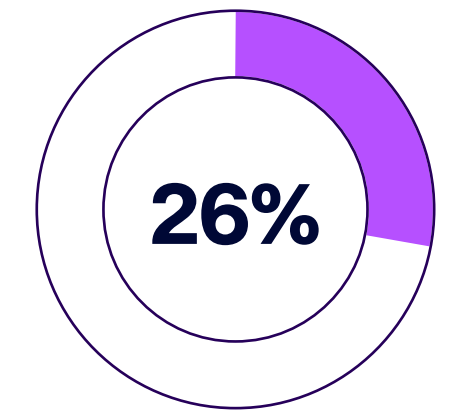


Hoteliers report focusing 2026 technology investments on tools and systems that directly enhance both operational efficiency and the guest experience. The top priorities, which include ‘personalization through technology and data’, ‘revenue management’, and ‘AI and automation’, indicate a strong focus on tools to make stays more tailored, sharpen pricing strategies, and support and streamline operations.

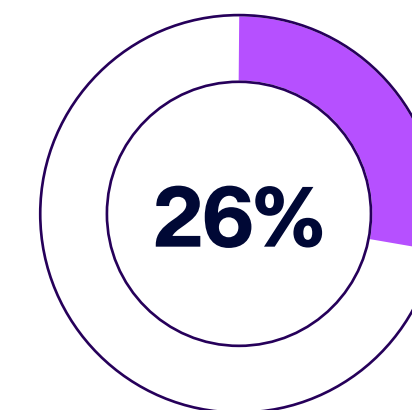
What are the top areas where hoteliers will prioritize investment in 2026?



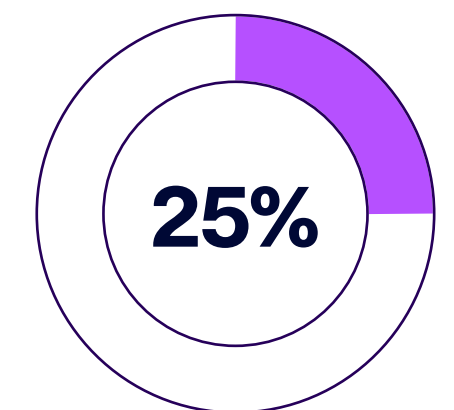
Technology and data to enable more personalized guest experiences



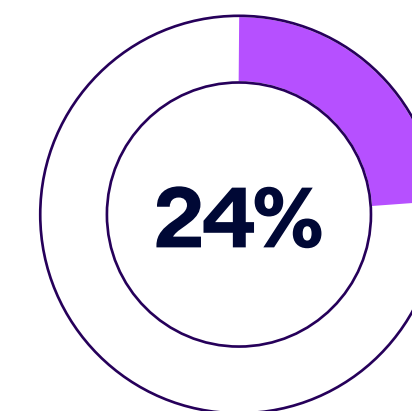
Revenue management and pricing optimization



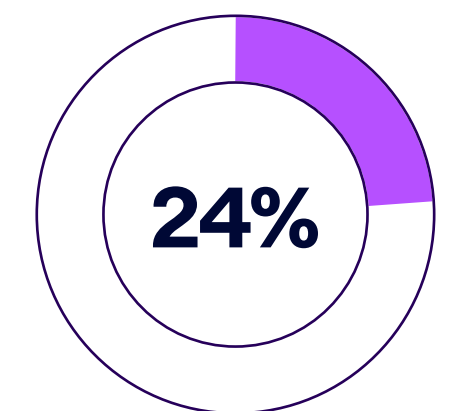
AI and automation



Digital marketing solutions (e.g. media, website design)



Customer data platforms



Market and competitive intelligence



Hoteliers turn to AI to drive profitability and operational efficiency



Hoteliers told researchers they see AI as a core strategic investment in 2026, rather than an experiment. Indeed, **499 out of the 500 hoteliers** questioned for Travel Dreams 2026 said they planned to invest in AI capabilities this year – spending an average of **\$319,000**.

Anticipated average spending per hotel on AI in 2026 was highest in North America (\$400,000) and Europe (\$363,000).

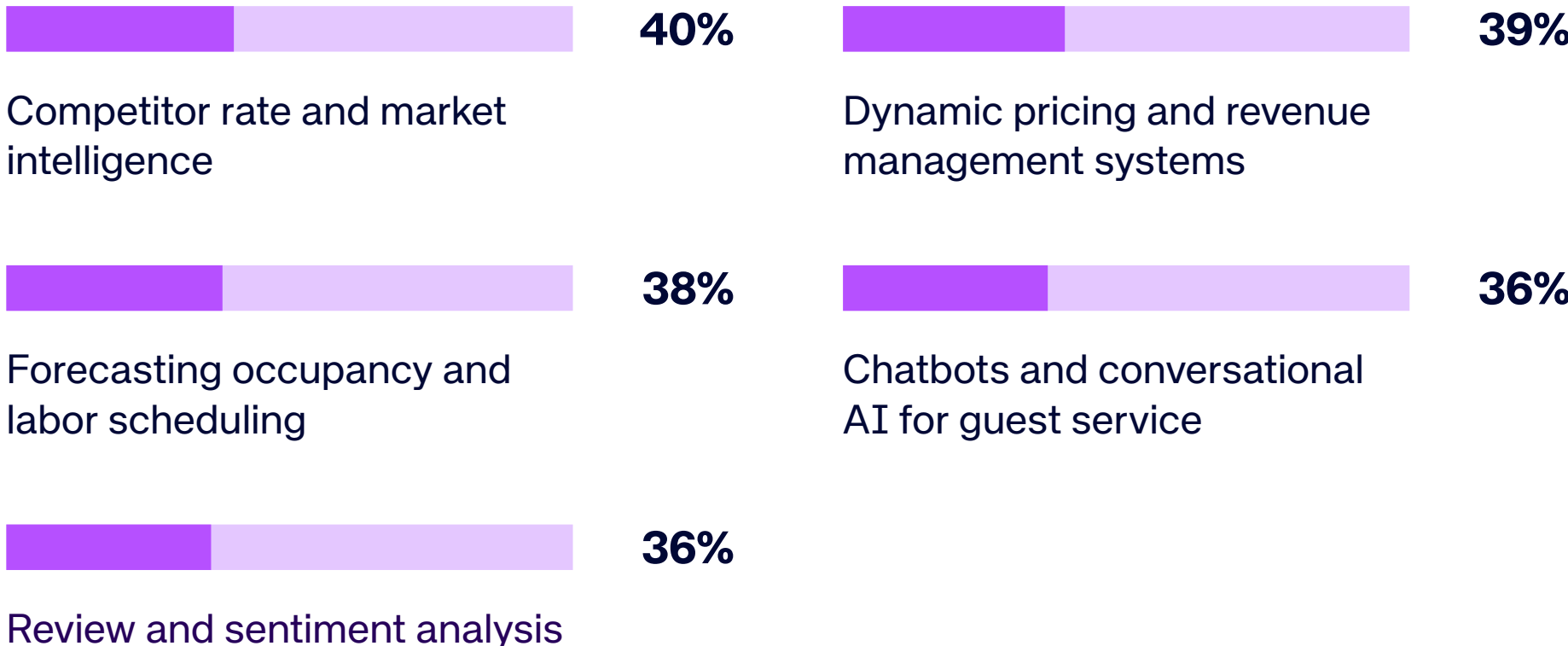
Over a fifth (22%) of hoteliers said they were planning on

Spending upwards of \$500,000 per property on AI

Moreover, hoteliers have already invested in significant AI capabilities, with 40% of hoteliers using the technology for ‘competitor rate and market intelligence,’ as well as ‘dynamic pricing and revenue management systems’ (39%), ‘forecasting occupancy and labor scheduling’ (38%), ‘chatbots and conversational AI for guest service’ and ‘review and sentiment analysis’ (both 36%).



Hoteliers are using AI for:





“

“Hoteliers report using AI first for commercially critical functions, which signals they trust the technology to directly drive profitability and operational efficiency. At the same time, plans around personalization, content creation, and predictive operations show AI is also seen as a key enabler of better guest experiences and scalable service, positioning it as both a revenue engine and a service differentiator.”

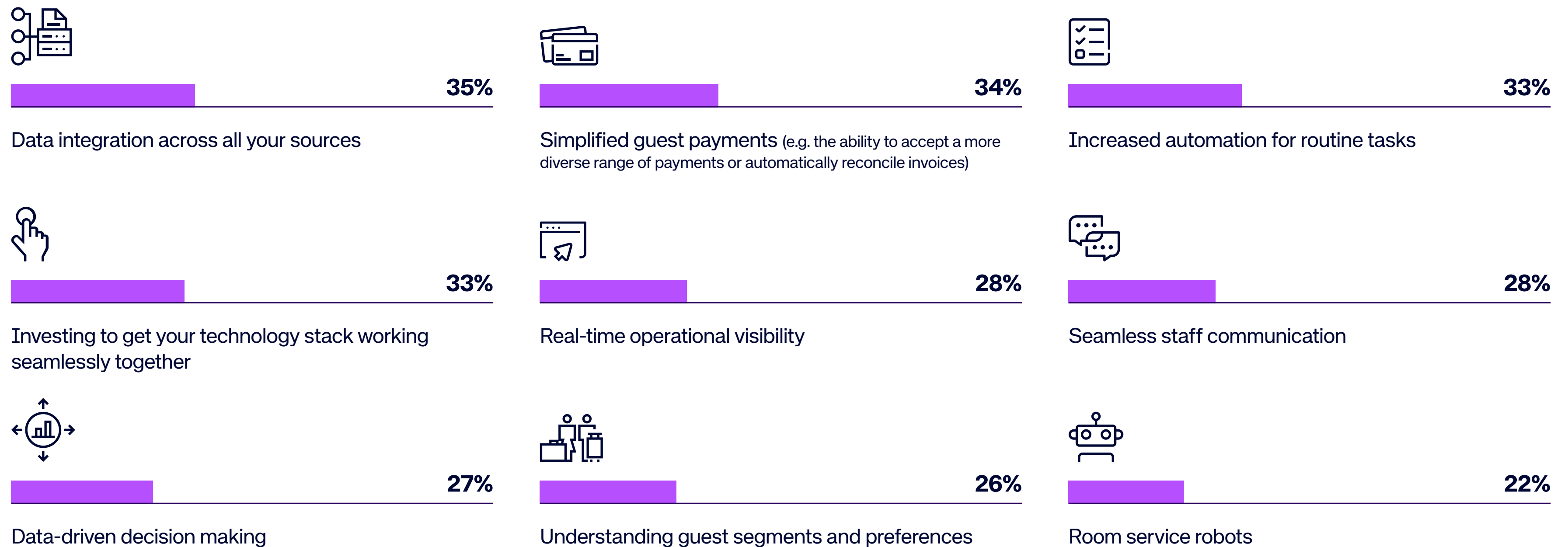
Vincent Lacroix

Head of Platform, AI & Shared Services,
Hospitality, Amadeus

When it comes to driving efficiency, investments in personalization, guest data platforms, and AI show a focus on tailored, memorable stays, while spending on data integration, automation, simplified payments, and seamless tech stacks highlights a drive to make day-to-day operations more efficient and connected.



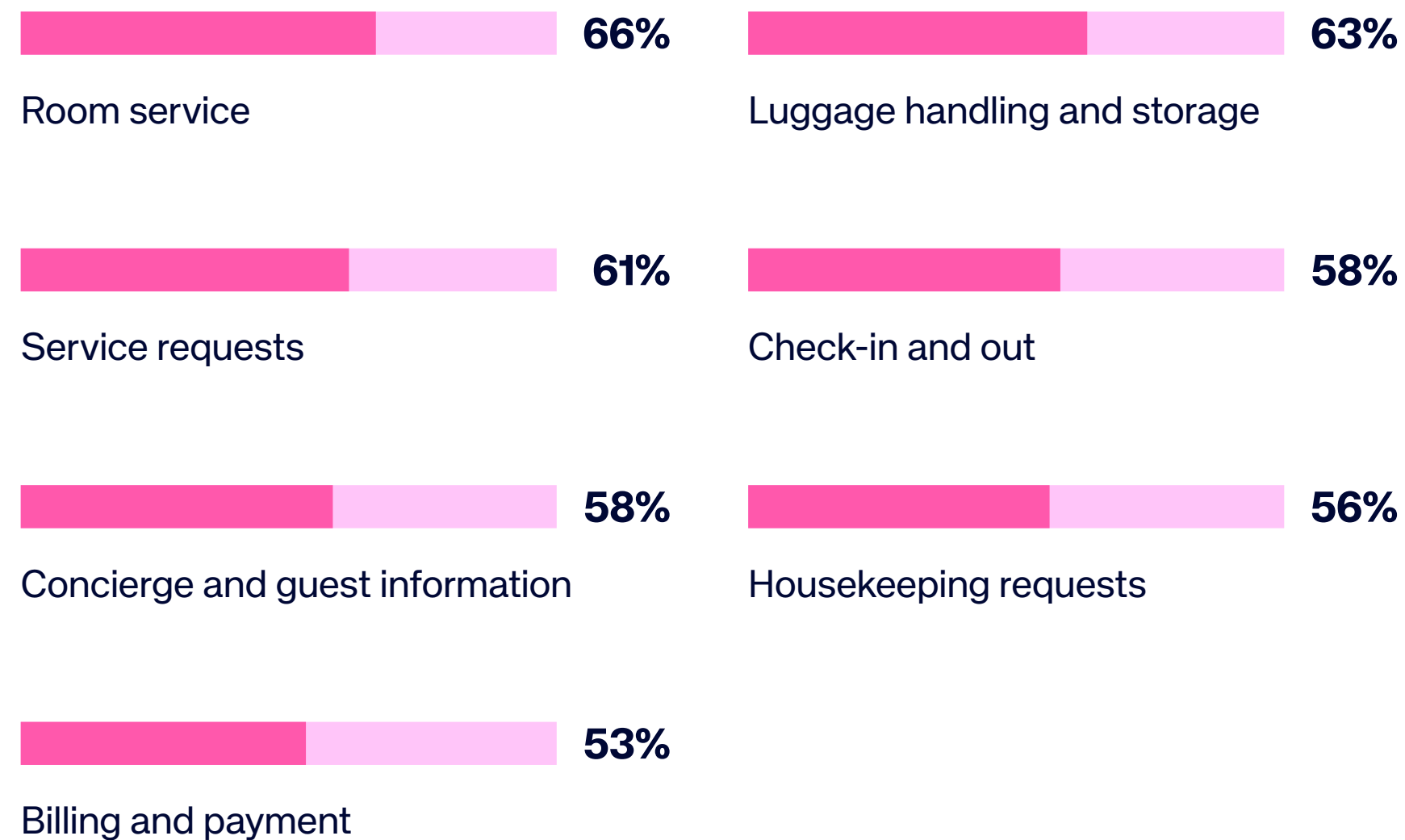
Which technological approaches are hoteliers considering purchasing to make day-to-day operations more efficient?



Yet findings suggest hotels must be careful not to overstep the mark when it comes to technology, with many travelers still preferring the human touch during many parts of a stay.

When asked which aspects of a hotel visit they would like to be mainly automated, only 'in-room controls, including temperature, lighting and entertainment systems' was selected by a majority of travelers, with 53% preferring this option.

In every other area, **a majority of travelers were looking for a more human-led interaction.** This included:



“Hotels are pouring investment into AI, data-driven personalization, and integrated systems to create more seamless, tailored guest experiences, and more efficient operations.

Yet, while technology can streamline tasks and offer convenience, these insights show travelers overwhelmingly value human interaction, whether it’s check-in, room service, or concierge support. Guests want staff to lead the experience, and poor service can quickly translate into negative reviews, which remain a critical factor in booking decisions.”

Jill Boegel

Head of Sales, North America, Hospitality, Amadeus



77%

of guests would leave a bad review owing to poor customer service

83%

of business travelers would leave a bad review owing to poor customer service

Keeping the customer happy is also critical when it comes to reviews, with 77% of guests highlighting they would leave a bad review owing to poor customer service, rising to 83% among business travelers.

Only 19% of all guests said they would not leave a negative review. Moreover, such reviews can be critical to the success of a hotel. Some 88% of travelers said reviews are important when choosing where to stay, rising to 91% among Millennials. Only 12% of all guests said reviews are not important.

Key takeaways

01

AI is a core strategy, used for pricing, forecasting, guest service, and market intelligence, with average anticipated spending of US\$319,000 per hotel.

02

Technology investments also target operational efficiency: data integration, automation, seamless payments, and connected tech stacks.

03

Despite tech adoption, **travelers strongly prefer human-led service** in most areas, making staff interaction critical to reviews and bookings.

04

Future AI plans focus on content creation, personalized recommendations, predictive operations, and sentiment analysis.

Part V

Differentiation
through
sustainability
and loyalty




Sustainability remains a key component of the travel experience

All 500 hoteliers questioned by *Travel Dreams 2026* researchers planned to spend on sustainability initiatives this year, looking to invest an average of 6.7% of overall business expenditure in this area.

Moreover, 35% of hoteliers said sustainability and eco-friendly practices are a key factor in how they are differentiated from competitors, while around a third questioned feel that there has been more emphasis on this area over the past five years.



The most common sustainability initiatives by hoteliers:

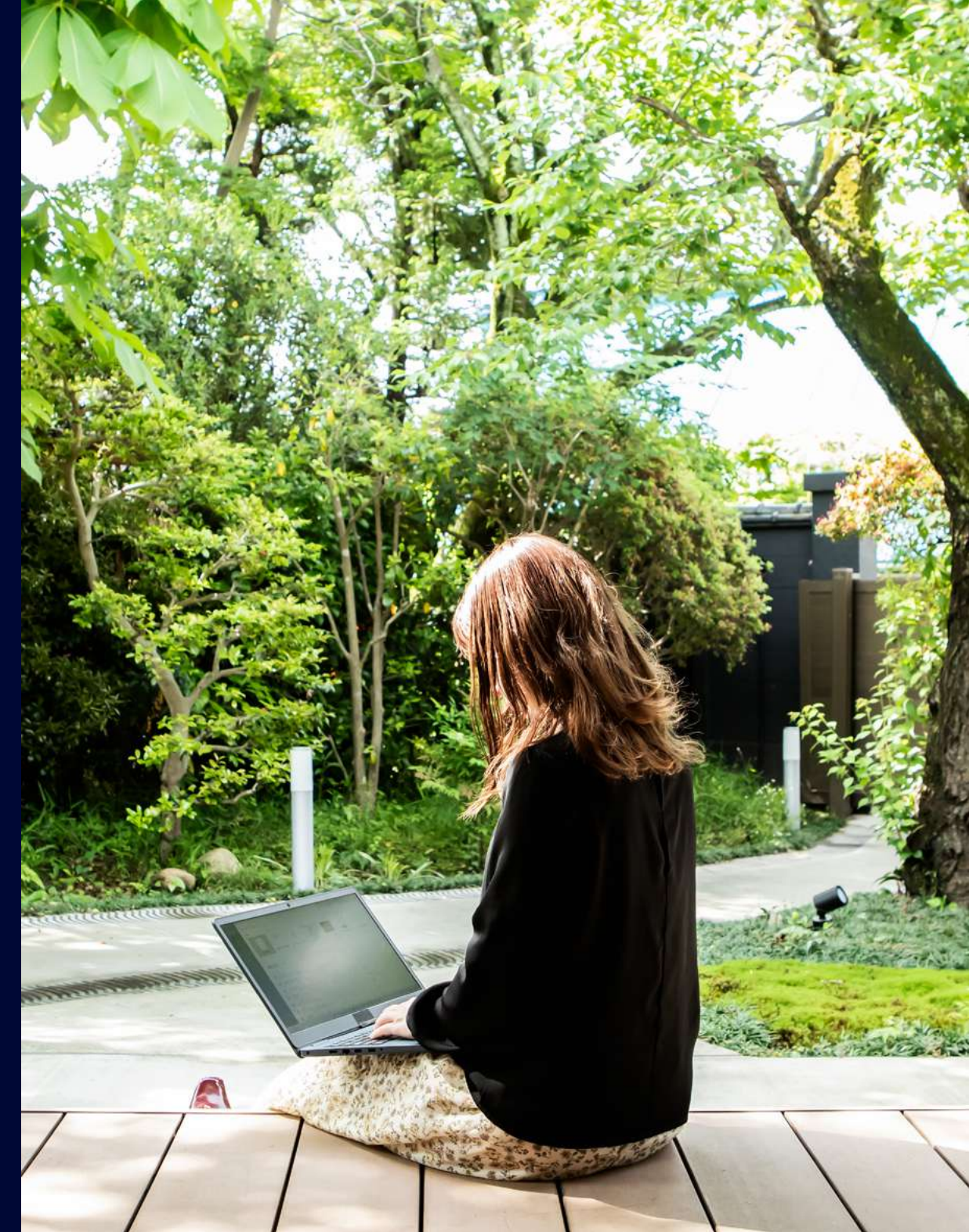
 **33%**
Water conservation

 **33%**
Sustainable food and beverage

 **33%**
Responsible supply chains

 **32%**
Waste reduction

 **32%**
Staff training



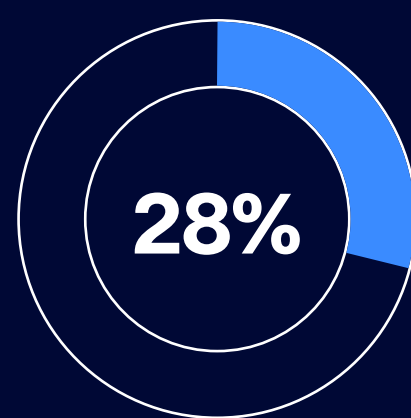
Where is this sustainability investment focused? *Travel Dreams 2026* data suggests sustainability is a mainstream operational priority, with hotels focused on practical, implementable measures.

The most common initiatives – ‘water conservation’ (33%), ‘sustainable food and beverage’ (33%), ‘responsible supply chains’ (33%), ‘waste reduction’ (32%) and ‘staff training’ (32%) – are all actions that fit naturally into day-to-day operations and can deliver relatively quick cost or efficiency benefits alongside environmental gains.

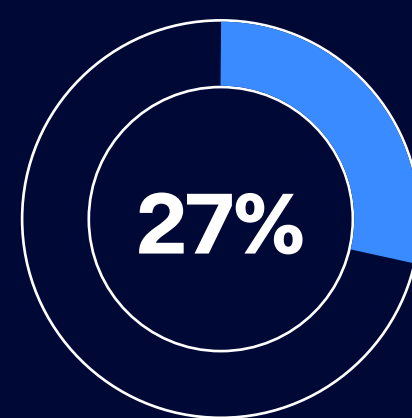
More advanced or guest-facing initiatives are less widely adopted.



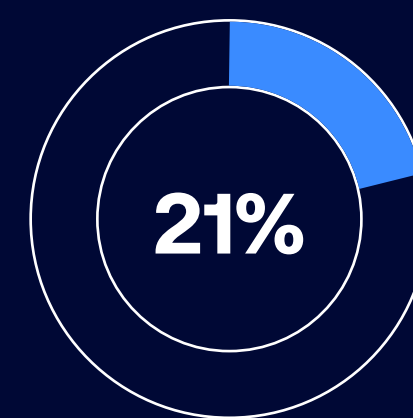
Areas like 'renewable energy', 'biodiversity projects' and 'linking sustainability to loyalty programs' remain lower priority, indicating that while hotels are making solid progress on foundational sustainability, many are still in the early stages of embedding it into their brand proposition, guest experience and long-term decarbonization strategies.



Renewable energy (e.g. on-site solar or battery storage)

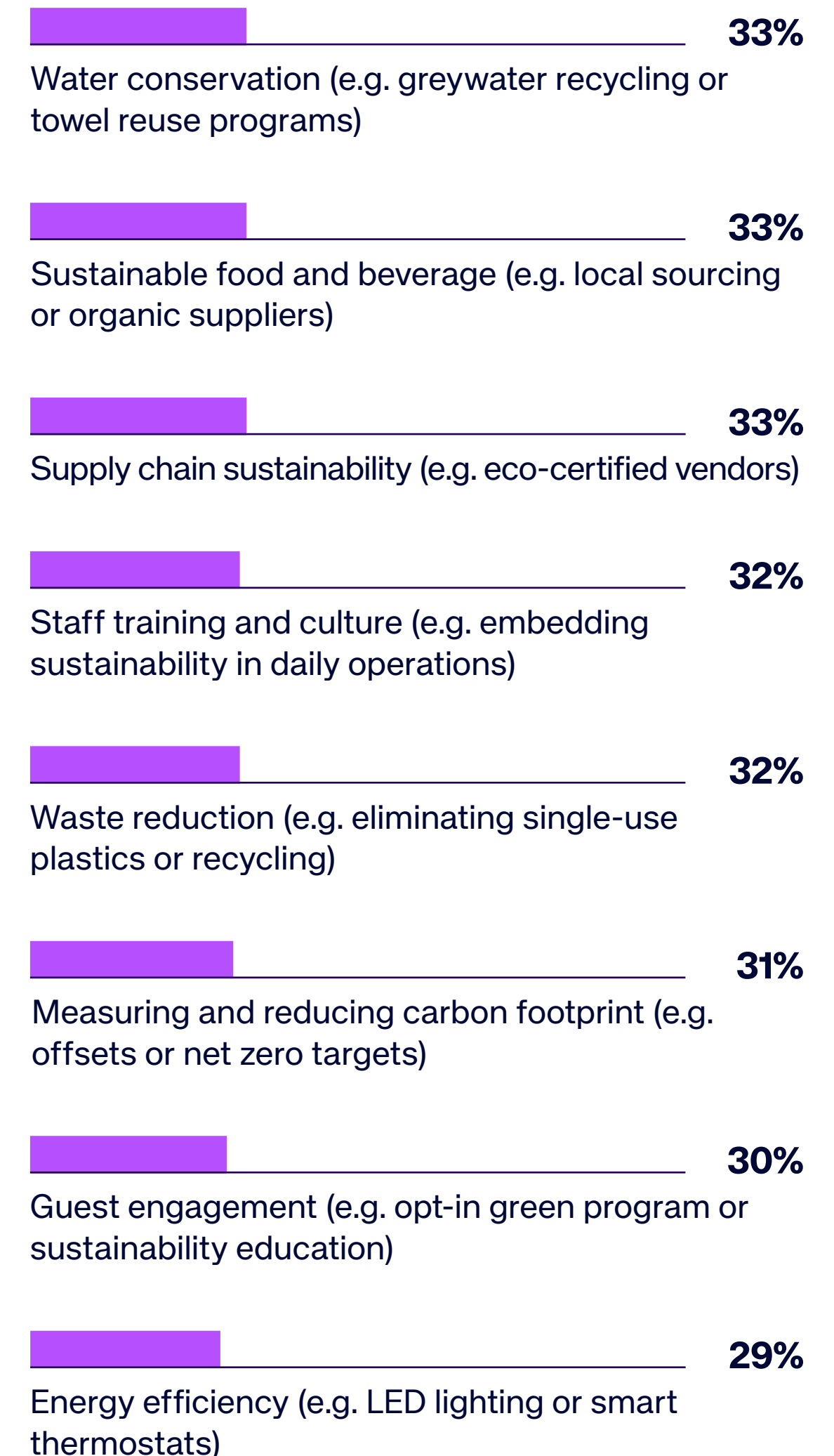


Biodiversity and community initiatives (e.g. nature restoration)



Linking loyalty points to low-impact stays

Which of the following sustainability initiatives are hoteliers currently participating in?



Sustainability also remains vital to guests – with 75% saying the sustainability credentials of a hotel are important to them when they consider booking. Over a third (35%) said they are very important. Interestingly, 93% of travelers questioned in India and 85% of those questioned in China said **sustainability was important to them**, compared to 65% in the UK and Germany.

 **93% of travelers from India**

 **85% of travelers from China**

 **65% of travelers from UK**

 **65% of travelers from Germany**



“Sustainability is important across our hotels – we have been working to install solar panels across our properties, for example. Guests increasingly demand that we demonstrate what we do in this area, while corporate travelers are keen when choosing where to book. But, most importantly, it is our own corporate responsibility which drives our actions.”

Lourdes Ancona Valdez

Corporate Director of Revenue Management,
RCD Hotels

Travelers who value sustainability reported being willing to pay 11.7% more per night to stay at a hotel with strong sustainability practices, equating to an additional \$29.25 on a \$250 room. Moreover, younger travelers are open to spending more, with the average Gen Z saying they would be open to pay an additional 14.7% per night for strong sustainability practices – or an extra \$36.75 a night in an average room.





“A gap remains between hotel efforts and guest expectations when it comes to sustainability, with the former still largely focused on efficiency and cost benefits behind the scenes. Guests, however, increasingly expect sustainability to be more visible, experiential, and embedded into the stay, from refillable amenities to reduced housekeeping and clearer low-impact choices.”

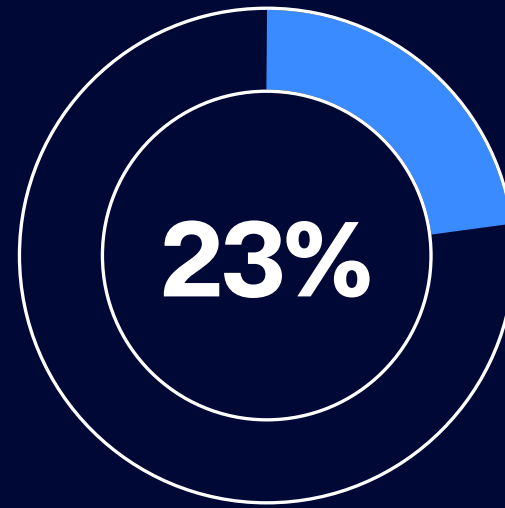
Joerg Schuler

Global Head of Commercial, Hospitality,
Amadeus

Loyalty poised for evolution in 2026 as personalization takes center stage

Loyalty schemes are expected to come under the spotlight this year, with 23% of hoteliers believing such programs are the best way for a property to measure success.

Hoteliers reported prioritizing technology and data to make loyalty more seamless and personalized, using apps, digital wallets and AI to recognize guests and tailor rewards in real time rather than after the stay. Simplicity is key.



“At The Ascott we understood, that to be competitive, we needed to develop our loyalty scheme. We asked the guests what they wanted from the scheme, and they told us they wanted points and to be able to spend those points with The Ascott.

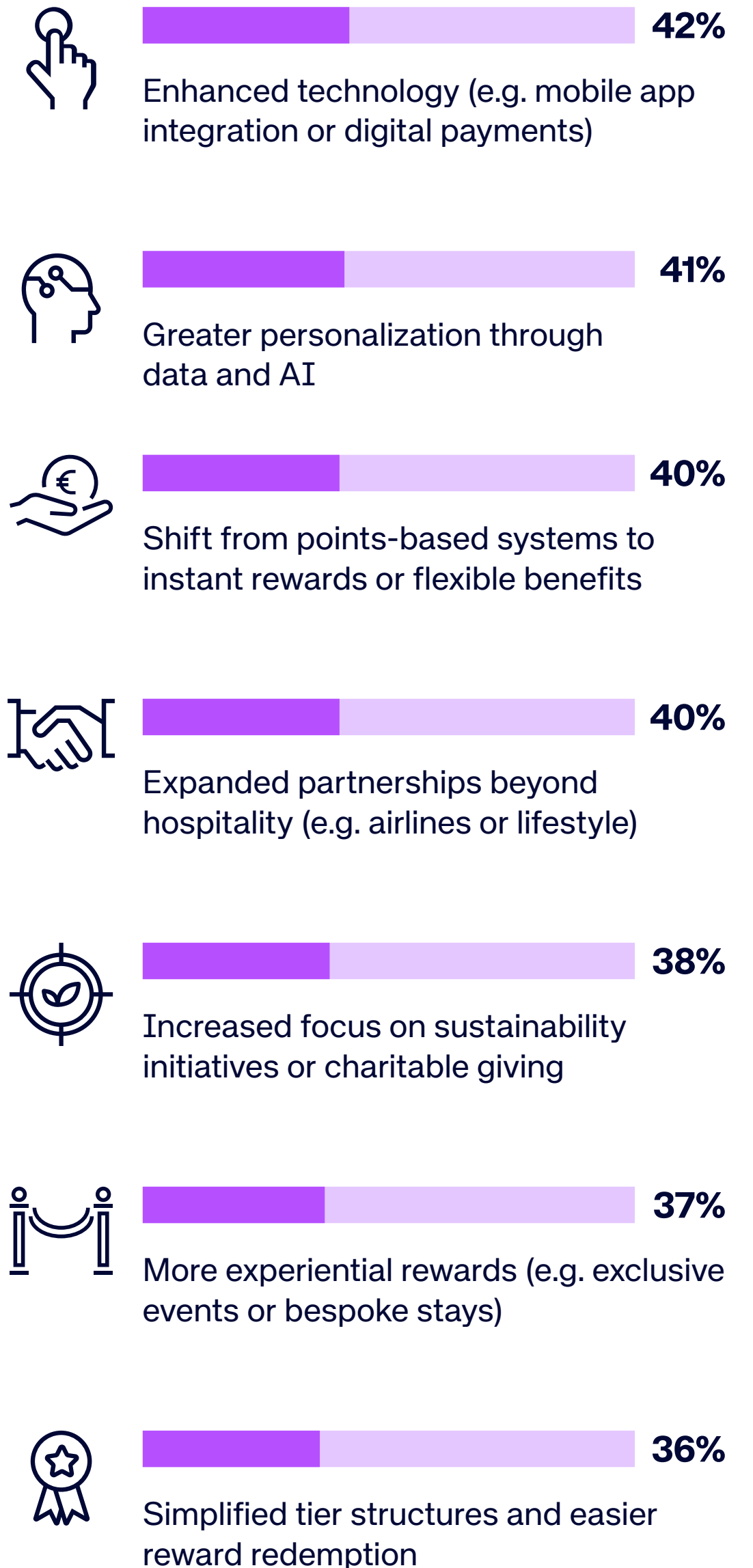
“We had expected people to request a spectrum of redemptions, but with this feedback we decided to keep our scheme simple. Some of these schemes can be complex, making it hard to understand the value of points, redemptions and locations and we have worked to avoid that.”

Tan Gan Hup

Vice President, Loyalty & Partnerships,
The Ascott Limited



How do hoteliers plan to evolve loyalty schemes over the next two years?



Key takeaways

01

Loyalty programs are shifting toward simplicity, providing benefits guests can easily understand and action.

02

Hotels are embedding sustainability into operations, with anticipated investments averaging 6.7% of budgets.

03

Guests value visible, experiential eco-practices and are willing to pay more for sustainable stays.



Part VI

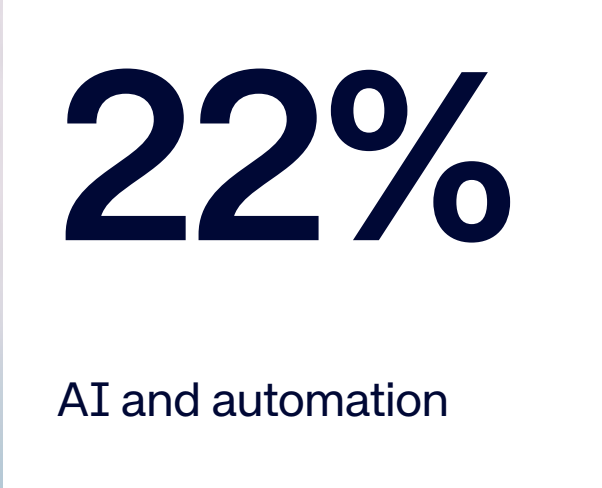
A look to
the future



Over the next five years, hoteliers see technology, particularly AI and automation, as the biggest transformative force in the industry, reflecting the ongoing push to streamline operations and enhance guest experiences. Beyond tech, hoteliers reported emerging trends in luxury tourism, changing traveler expectations, and the growth of alternative accommodations, which suggest they will need to be more flexible and innovative in how they attract and serve guests.



What do hoteliers think will most transform the hospitality industry over the next five years?



Asked to discuss what they would like to achieve using technology this year, hoteliers told *Travel Dreams* researchers they are primarily focused on creating more seamless, more meaningful, and more efficient guest experiences.

Behind the scenes, hoteliers identified the need to improve efficiency, reduce waste, and address rising operational costs, freeing staff to focus on higher-value, guest-facing roles. Overall, the goal is a single, connected digital ecosystem that boosts profitability while delivering smoother, smarter, and more sustainable hotel experiences.

The message is unmistakable. Hotels and DMOs have more tools than ever before to understand the traveler, creating opportunities to translate insights into personalized, human-led stays. Technology can be used to remove friction, tailor services, and create emotionally resonant moments that guests remember long after they leave.

The future of hospitality belongs to those who can turn complexity into clarity, data into delight, and every journey into something genuinely memorable.



“We have made significant progress in leveraging technology to deliver consistent, elevated luxury experiences across our portfolio. Through AI-driven customer targeting and data ecosystem we bring together insights across channels to create connected intelligence — a unified, real-time view of the guest. This has strengthened precision in pricing, enhanced demand forecasting accuracy, optimized channel mix, and driven stronger performance outcomes across key commercial metrics.”

Anupriya Ghosh

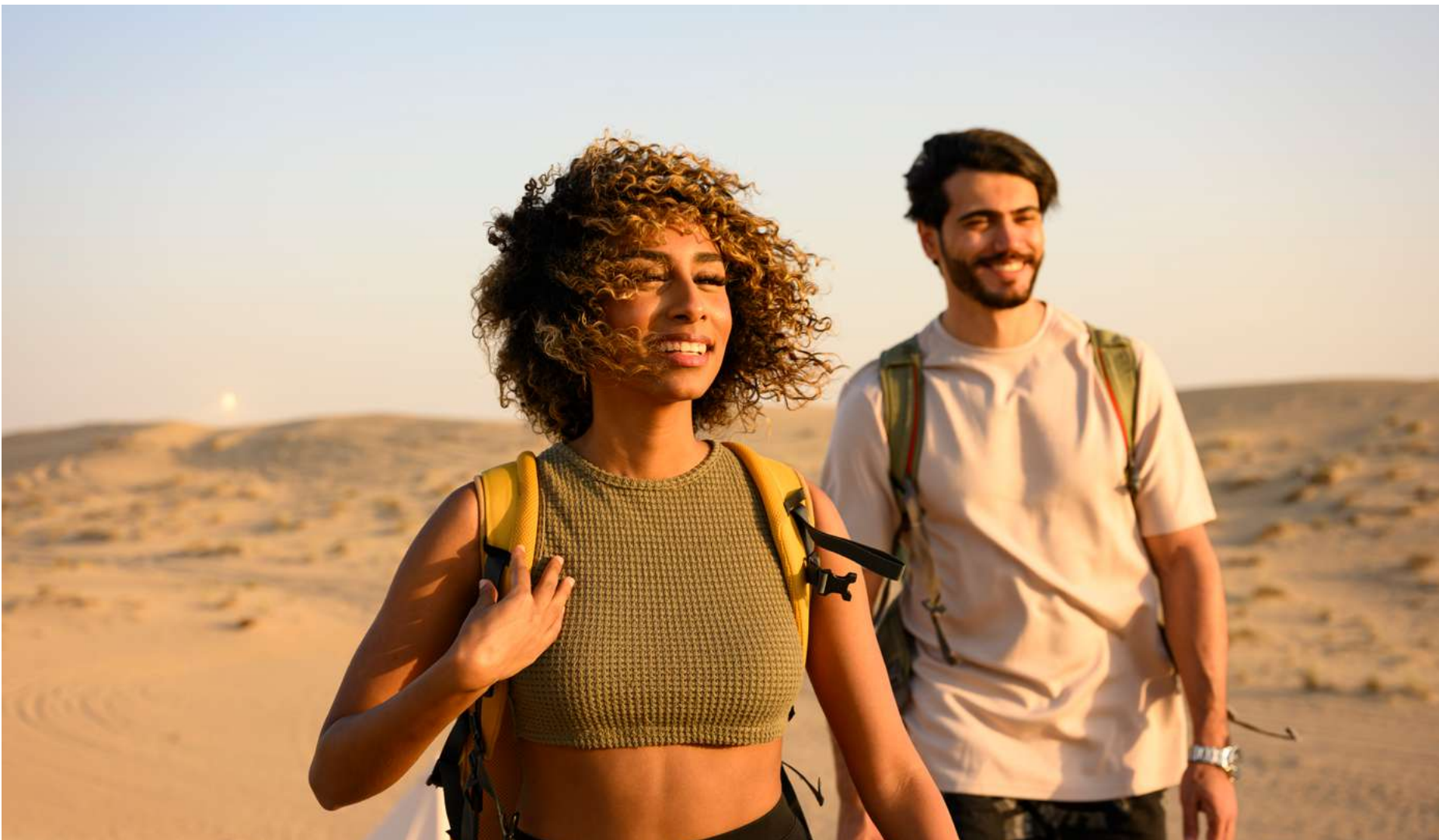
Vice President, Revenue Management, The Leela Palaces,
Hotels & Resorts

Methodology

Amadeus commissioned strategic insight agency Opinium Research to question 6,000 leisure and business travelers from Australia, China, Germany, India, the United Kingdom and United States during the fourth quarter of 2025.

A total of 500 hoteliers - holding the position of General Manager and above - from Australia (50), France (50), India (50), Mexico (50), South Africa (50), Thailand (50), UAE (50), UK (50), and the USA (100) were also questioned by Opinium.

In addition, Amadeus interviewed representatives from Amora Hotels & Resorts, Grand Beach Hotel Miami Beach, Minor Hotels, The Ascott Limited, The Leela Palaces, Hotels & Resorts, RCD Hotels, and Village Hotels, alongside the Department of Tourism & Culture – Abu Dhabi, Tourism Malaysia, Türkiye Tourism Promotion & Development Agency, and Visit Los Cabos.



****Indicative Annual Revenue Potential from Attribute-Based Merchandising**

Based on Survey Responses and Illustrative Pricing Assumptions.

To demonstrate how traveler willingness-to-pay could translate into meaningful ancillary revenue for hotels, we modeled a mid-market property using conservative, illustrative pricing for the six most in-demand room attributes identified by our representative survey data.

Assumptions:

- 150-room mid-scale hotel
- 70% annual occupancy
- Traveler uptake reflects the percentage of surveyed travelers willing to pay >11% above room rate
- Formula: Annual revenue = 38,000 × (% willing to pay >11%) × sample attribute price
- This illustrative model also assumes guests may purchase more than one attribute during a stay; actual performance will vary based on merchandising rules and operational constraints

Tier 1 Attributes: Quick-to-Implement, High-Appeal Options

Attribute	Sample Price (US\$)*	% Travelers Willing to Pay >11%	Indicative Annual Revenue (US\$)
Early check-in / late check-out	30	33%	376,200
View or floor selection	25	37%	351,500
Personalized welcome amenities	25	28%	266,000
Tier 1 Subtotal			993,700

The survey results also reveal a second tier of strategic upsells with similarly significant revenue potential that hoteliers could consider. Each is likely to achieve greater potential if targeting is supported by strong customer insight.

Tier 2 Attributes: Experience-Led, High-Value Enhancements

Attribute	Sample Price (US\$)*	% Travelers Willing to Pay >11%	Indicative Annual Revenue (US\$)
Sleep optimization package: including premium bedding, white noise devices and aromatherapy	30	30%	342,000
Enhanced air quality / oxygen options: featuring oxygen enrichment and air purification	40	31%	471,200
Local experience kits / guides: including neighborhood guides and artisan souvenirs	20	32%	243,200
Tier 2 Subtotal			1,056,400

Estimated Total Annual Potential Across All Six Attributes

In excess of \$1,000,000

* Sample attribute pricing is illustrative and based on publicly available hotel upsell menus, OTA add-on pricing, and external online research. Prices may vary by market, season, and hotel strategy. These figures are not derived from Amadeus internal commercial data and are used solely for modeling purposes. Results are indicative estimates only; actual outcomes will vary depending on property characteristics, pricing strategy, guest mix, and operational conditions.

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