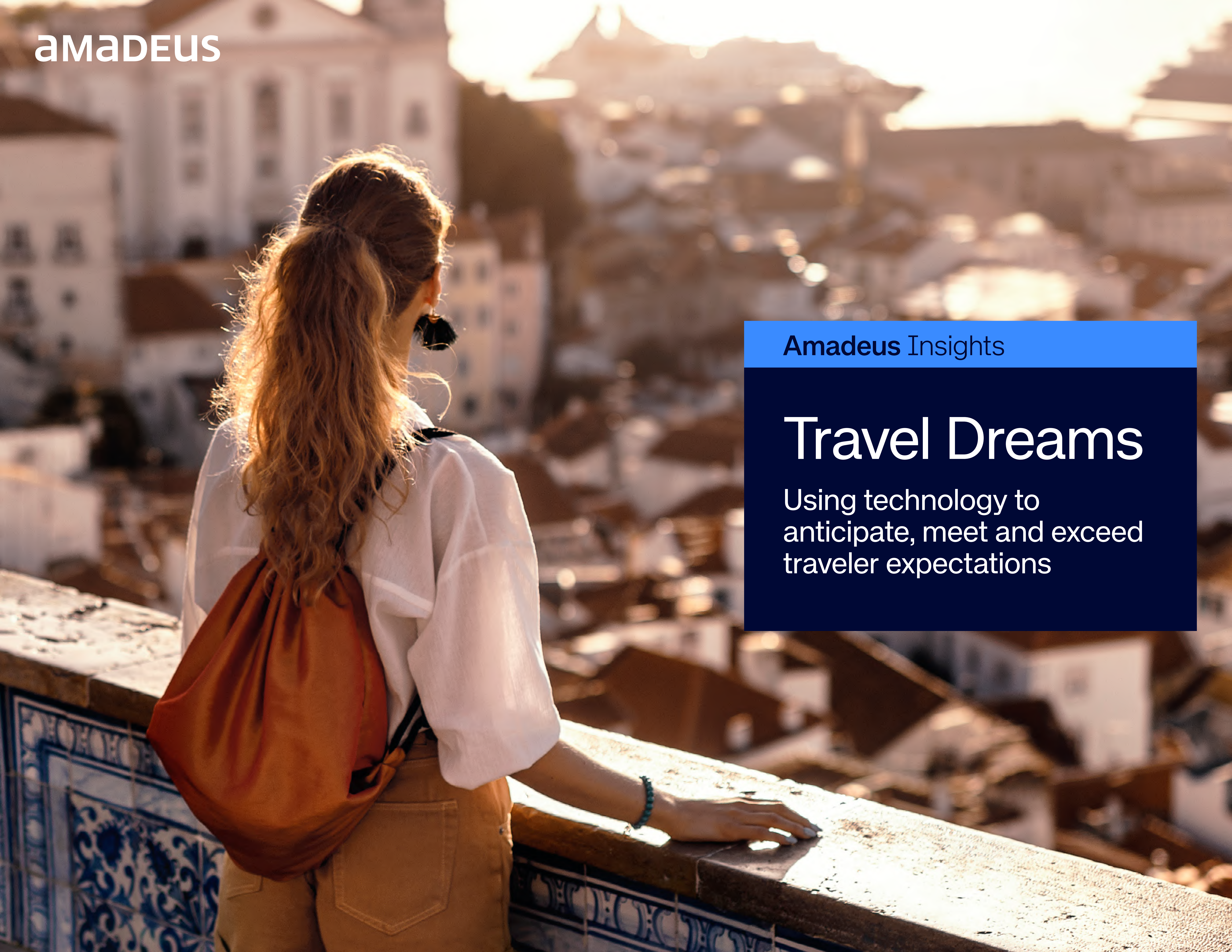

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Amadeus Insights

Travel Dreams

Using technology to anticipate, meet and exceed traveler expectations

Contents

Foreword

Travel Dreams is a new piece of research from Amadeus Hospitality which explores what travelers – both leisure and business – expect from a trip and, importantly, how technology can transform that process.

We look in turn at each stage of the journey, asking how travelers choose where to visit, what shapes their booking experience, what factors impact a trip once they are on the road and what they dream of when they think of future trips.

Insight for this report was provided by 6,000 travelers from around the world, while it also draws on the expertise of both Amadeus' own travel technology experts and the acumen of our valued partners.

Research of this kind is of course vital to our ambitions here at Amadeus – only through understanding the traveler can we work with our partners across the ecosystem to create solutions tailored to meet their evolving needs.

From the moment travelers begin searching for their trip to the time they return home, we work to empower hotels, destinations and travel providers with industry-leading technology and insights that enable exceptional experiences at every step of the journey.

Drawing from the most comprehensive travel data available today, the intelligence and campaigns delivered by Amadeus enable our partners to drive profitable demand, maximize revenues and take advantage of game-changing competitive and operational analysis.

We work to transform customer experiences and build lasting loyalty.

I hope *Travel Dreams* answers some of the questions you may have about changing traveler behaviors and shines a spotlight on how to respond.

Francisco Pérez-Lozao Rüter
President, Hospitality,
Amadeus

Introduction

Travel technology is in a permanent state of evolution. Solutions which have served us well become dated as expectations change, and new standards emerge. To remain ahead of this curve, it's vital to understand the preferences of those who drive this change: travelers themselves.

With *Travel Dreams*, Amadeus has undertaken to do just this. Working alongside **Opinium Research**, 6,000 travelers in six markets – USA, China, Germany, UK, France and India – were asked a series of questions to deepen understanding of the end-to-end travel experience. Each of the markets was identified by the World Travel & Tourism Council (**WTTC**) as a leader in driving tourism in 2024.

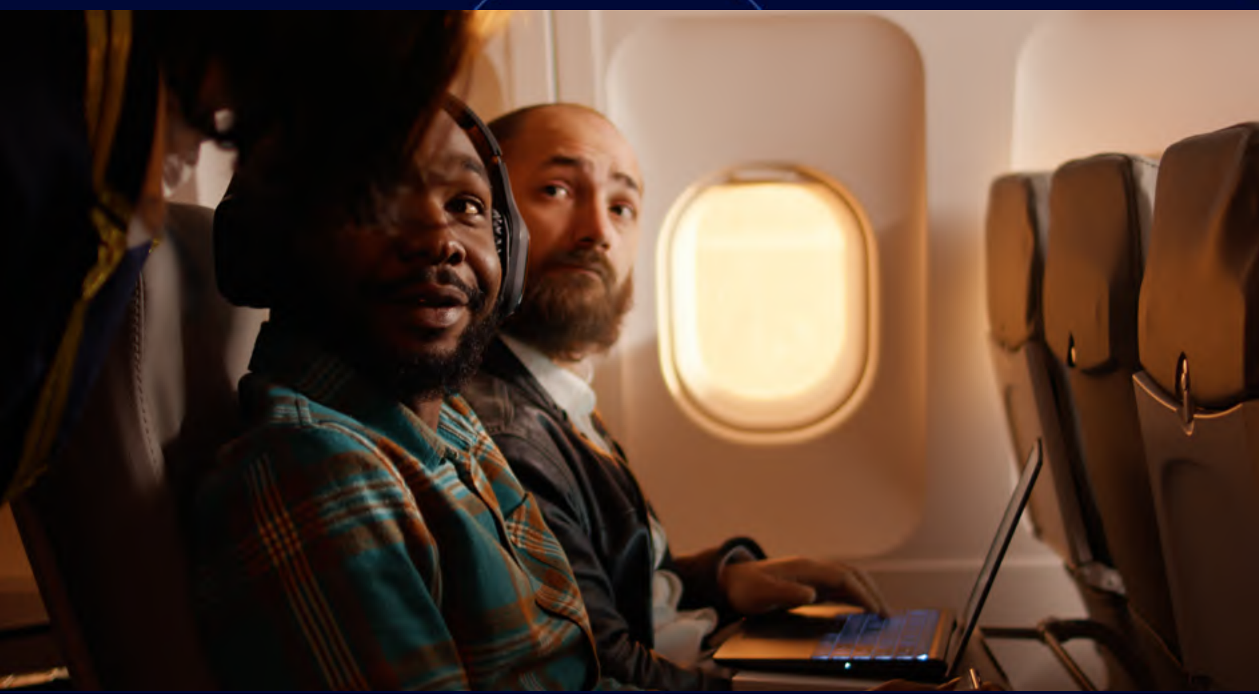
The findings presented here offer invaluable insight into what motivates travelers, what they expect from a destination, what inspires them, drives their loyalty and more.

Results are provided to deliver maximum value and actionable insights for hoteliers, car rental providers, insurers, destination management companies and other providers. The tangible findings presented below can play a vital role in understanding how the travel landscape is changing - and how to respond.

Before exploring the findings in more detail, the key discoveries are presented below.

Travel Dreams

5 key discoveries



1 Travelers are willing to pay significant sums for hotel features

63%

← **Of the travelers surveyed said they would pay extra for hotel features.**

Among the most popular add-ons were a specific view, premium entertainment packages like an Xbox, and local attractions.

12%

← **Any one of these features could add around 12% to room booking revenues.**

$5,383 per room, per year*

*Please see Methodology on **page 47** ↗ for calculation.

2 The channels influencing travel choices are quickly shifting

70%

Social media and travel influencers are rising most quickly in importance when compared to five years ago. Top three countries looking to travel influencers:

50%	50%	27%
China	India	USA

← **Virtual reality is important too,** with 70% of travelers saying they would like to take a virtual tour of a destination in advance of traveling, rising even further among travelers from India (86%) and China (85%).

3 Leisure travelers crave the personal touch from hotels

48%

← Some **48% of leisure guests are decisive about their preference for a traditional check-in desk, with a person to talk them through the hotel amenities.**

For a repeat visit,

50%

of leisure guests said they would like the hotel to know them better, interact with them 'person-to-person' and be welcomed individually when they get there.

4 Business travelers are looking for more technology in their pursuit of efficiency

71%

↑ Of business travelers are keen for a form of **online or self-service check-in.**

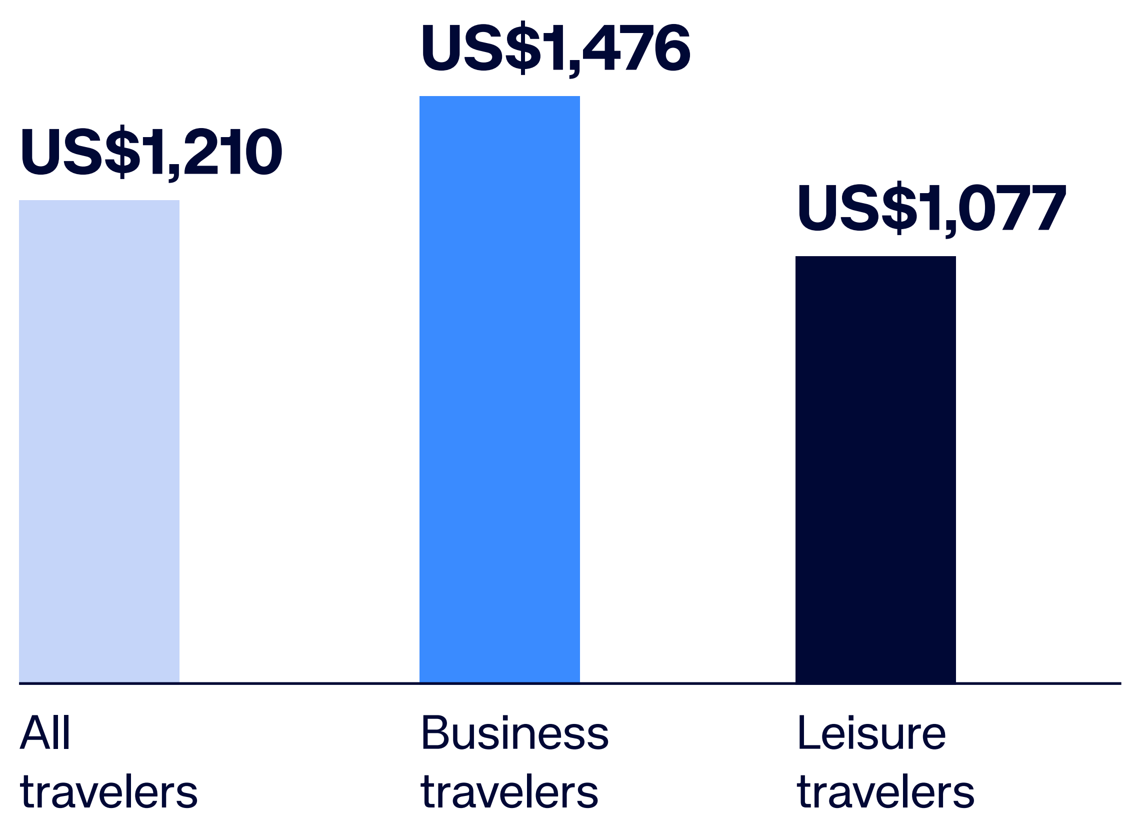
41%

↑ Of business travelers saw **Artificial Intelligence (AI) personalization** as part of an ideal future stay.

22%

↑ Of business travelers **want the option of paying with crypto currency or a digital wallet** in the future.

5 Lack of insurance is costing travelers real money



Inspiration Phase

How do travelers decide where to visit, what are they looking for from a journey, and how have these factors changed over time? The first section of *Travel Dreams* offers the answers.

When asked what most inspires the choice of a travel destination, 'stunning landscapes and natural beauty' was selected by 60% of leisure travelers questioned – making it the most popular factor in the decision-making process.

The finding was consistent across generations, with 51% of Gen Z travelers (those aged 18-27) selecting this inspiration, along with 56% of Millennials (those aged 28-43), 60% of Generation X (those aged 44-59), 69% of Boomers (those aged 60-78) and 72% of the Silent Generation (those aged 79+).

51%
of **Gen Z travelers** (those aged 18-27)

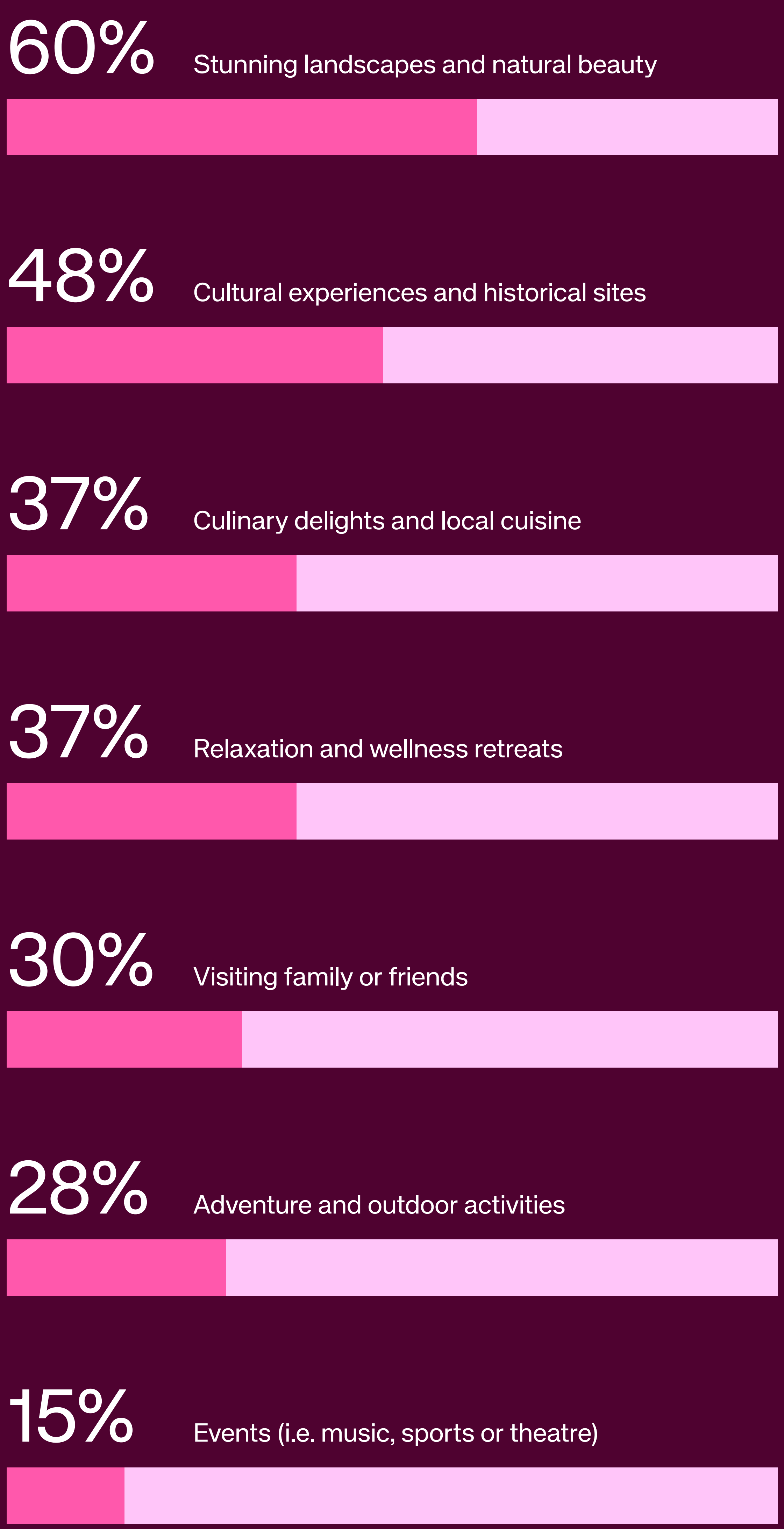
56%
of **Millennials** (those aged 28-43)

60%
of **Generation X** (those aged 44-59)

69%
of **Boomers** (those aged 60-78)

72%
of the **Silent Generation** (those aged 79+)

What most inspires leisure travelers' choice of travel destination?



Interestingly, United States-based travelers were particularly keen to spend time with loved ones, with 45% stating 'visiting family or friends' inspired travel choices, falling to just 15% among Chinese travelers.

Questioned on what would inspire them to add a leisure component to a trip, business travelers responding to *Travel Dreams* revealed similar motivations to their leisure traveler peers. Natural beauty (50%), cultural experiences (45%) and relaxation and wellness (40%) were again among the most cited inspirations.

For travel sellers, hoteliers, convention & visitor bureaus (CVBs) and destination management companies (DMOs), showcasing the natural wonder of a destination is therefore imperative during the inspiration phase for both leisure and potential 'blended' trip travelers.

Inspirations:

50%
Natural beauty

45%
Cultural experiences

40%
Relaxation and wellness

New channels and opportunities for inspiration are emerging

While these inspirations to travel could perhaps have been anticipated, where travelers source inspiration is changing rapidly.

	5 years ago	Today
Newspaper ads or articles	26%	18%
Agents with a physical presence	25%	19%

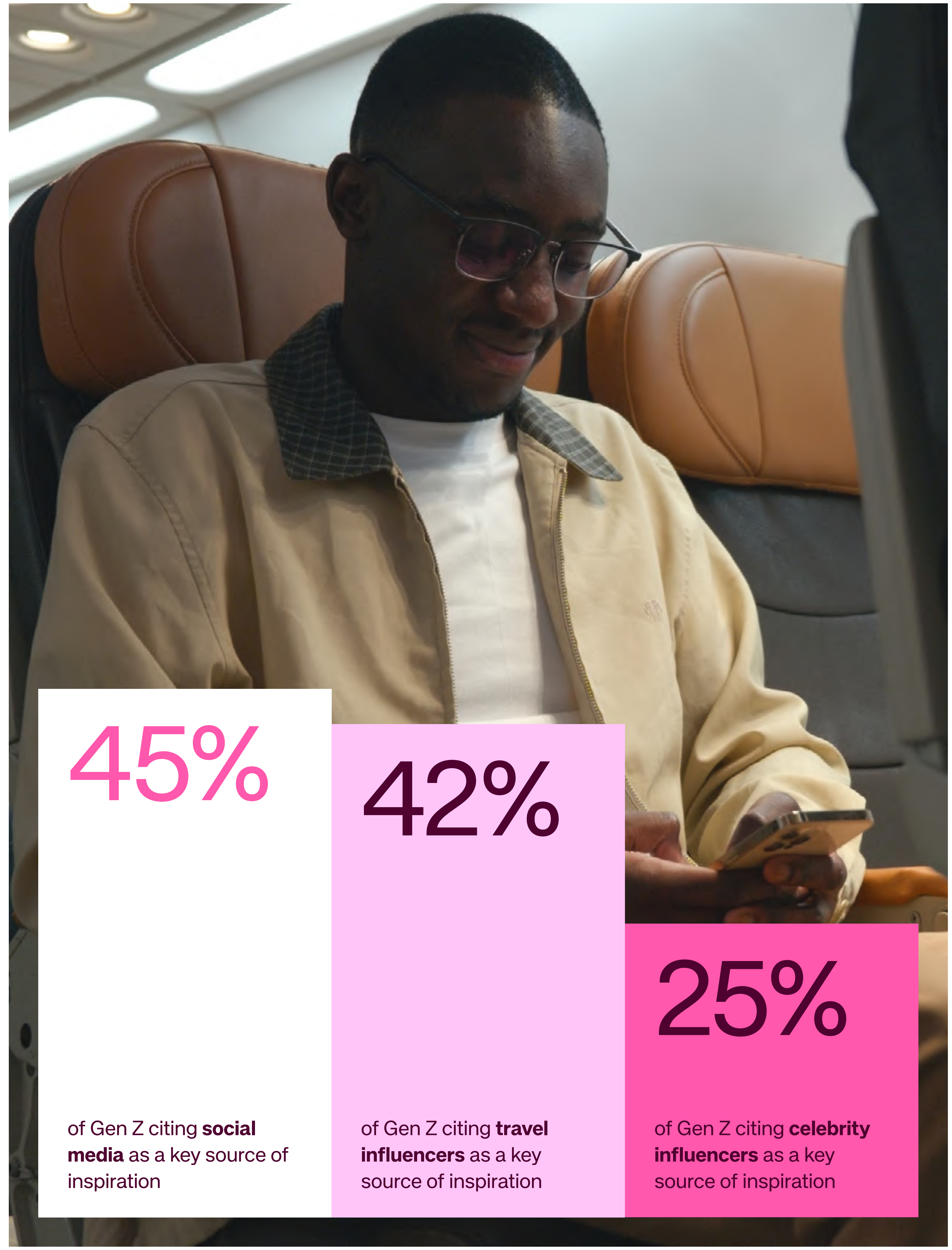
When asked about the influences behind selecting a travel destination, traditional motivators are out of fashion. For example, 'newspaper ads or articles' fell as a source of inspiration from 26% for travelers five years ago to 18% today. At the same time, while 'agents with a physical presence' were a source of inspiration for 25% of those questioned five years ago, this is down to a still respectable 19% today.

A new era of the influencers and immersive visuals

	5 years ago	Today
Friends and family recommendations	46%	50%
Social media adverts and posts	23%	33%
Travel influencers	20%	29%

While 'friends and family recommendations' are still the top source of inspiration (rising from 46% to 50% over the past five years), there has been a sharp increase in the number of travelers citing 'social media adverts and posts' as a source of inspiration (up from 23% to 33% over the past five years) and 'travel influencers' (up from 20% to 29% over the same period).

This trend is also accelerating among younger travelers, with 45% of Gen Z citing social media as a key source of inspiration, as well as travel influencers (42%) and celebrity influencers (25%), significantly higher than among older age groups.



"At Lexis Hotels, we are seeing a significant trend toward digital advertising – and this is where we focus the majority - 80% - of our marketing budget. We also work very closely with travel influencers throughout the world; we can offer them a specific code they can share to drive direct bookings. This lets us track which influencers are reaching the right audiences."

Samantha Lee
Vice President for Marketing & Innovation, Lexis Hotels

"We work across a number of channels as part of our marketing mix – a 360° approach. This includes social media, influencers, paid advertising and organic – we tick all of the boxes. When you have each channel covered, the results can be impressive."

Maren Dragon
Vice President, Marketing, Flemings Hotels

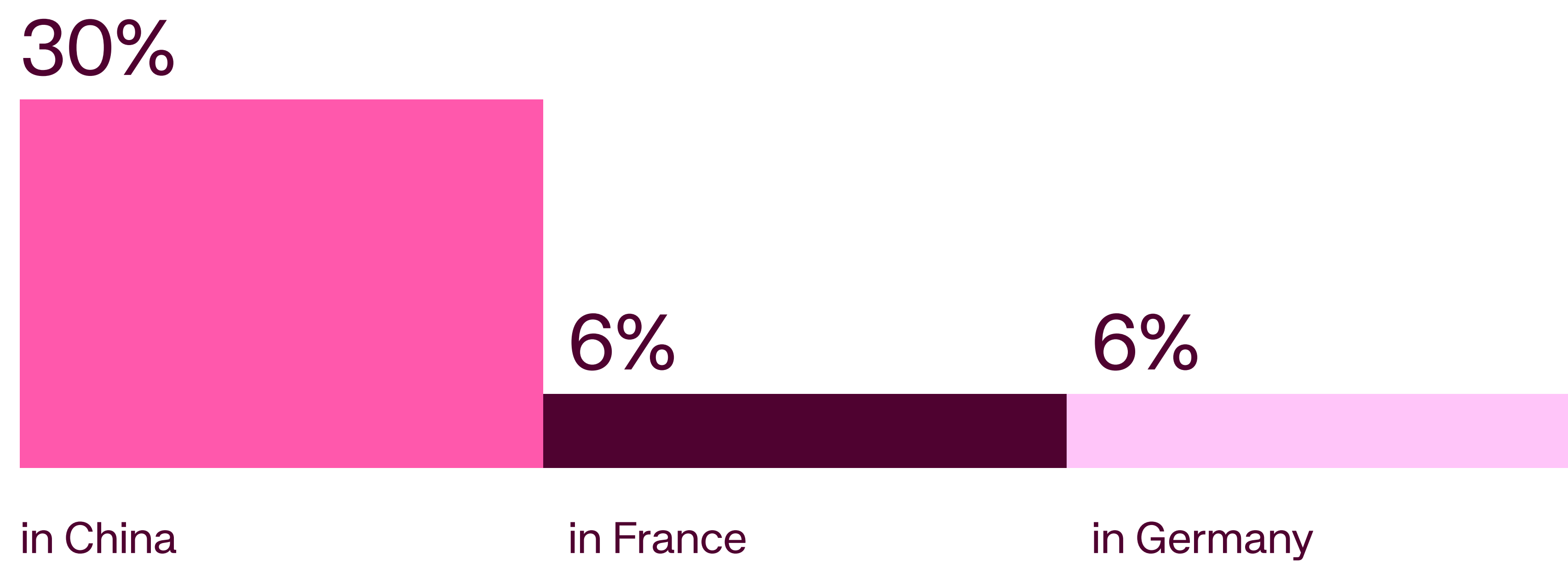
"It is important to keep evolving your sales and marketing strategy, and it's important to have external support and a 'devil's advocate' to do this effectively, to challenge your assumptions and check that you are really picking the best options open to you."

Alexander Jovanovic
General Manager, Trans Resort Bali

There are significant differences between countries. In China, around a third (30%) of those questioned said travel celebrities would influence their choice of travel destination, though this falls in European markets. For example, the percentage stands at just 6% in both France and Germany.

New channels to reach travelers during the inspiration phase of a journey are rapidly evolving and hoteliers must ensure their offerings are promoted in the right place to drive bookings.

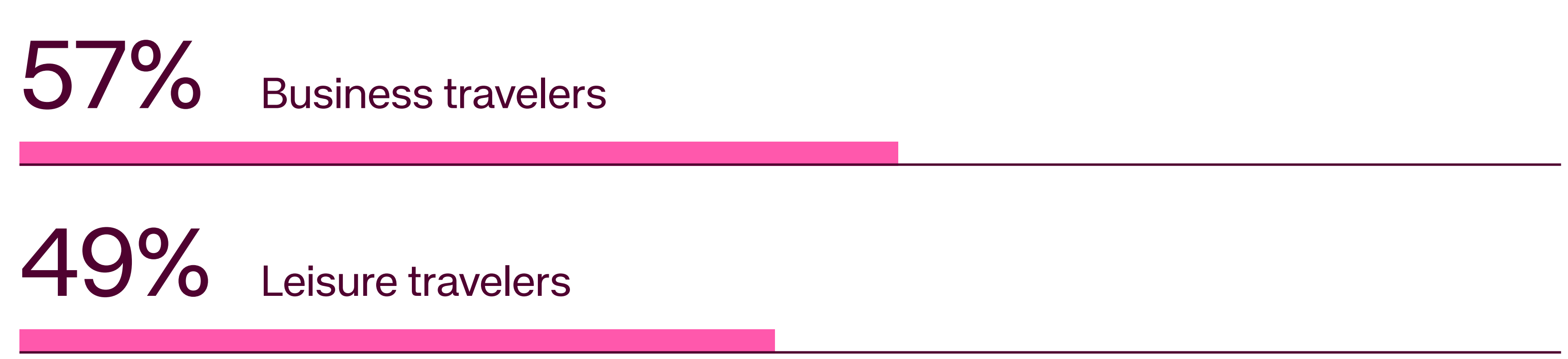
Travel celebrities would influence the choice of travel destination:



The type of content used for inspiration is also significant, with **64% of those questioned saying 'high quality pictures and videos showcasing stunning scenery and local attractions'** got them most excited to travel.

The figures were largely similar when split between business and leisure travelers, though, perhaps surprisingly, business travelers were more interested in 'personal stories or reviews from travelers who have visited the destination', cited by 57% of this group, compared to 49% of leisure travelers.

Interested in 'personal stories':



One emerging area of excitement when it comes to content is virtual tours, with 82% of business travelers and 66% of leisure travelers ‘very’ or ‘somewhat’ likely to take the opportunity to explore a destination digitally before taking a trip. **Travelers from India are the most likely to take a virtual tour of a destination before traveling**, with 61% ‘very likely’ to do so.

For guests, this technology can provide an immersive and detailed view of a property or location, helping to make informed booking decisions. By building trust with a virtual tour, travel sellers can reduce uncertainty and drive conversion rates.

Explore a destination digitally before taking a trip:

> “We offer virtual reality tours, which are particularly attractive to the Meetings, Incentives, Conferences & Exhibitions (MICE) market. Guests can take a 360° tour of every room type, walking through the resort. There has been high take-up on these tours, also among guests with special needs. A tour lets guests explore before they arrive, to see if the rooms are big enough, the facilities are in place.
>
> “Event planners, wedding planners also use this tool to see the beach, the facilities – we see this as an important business-to-business travel tool, but it is also beneficial for leisure sector as well.”
>
> **Samantha Lee**
> Vice President for Marketing & Innovation, Lexis Hotels

Safety is more important than ever

When asked about the most important factors when searching for a travel destination, *Travel Dreams* respondents revealed that safety is more important than ever. Today, 58% of those questioned cite safety as a top factor influencing the decision-making process, up from 51% five years ago.

5 years ago	Today
Safety	
51%	58%

Today, leisure travelers place an even higher value on safety than their business counterparts, with 59% viewing the factor as an important deciding factor in location selection, compared to 56% of business travelers.

Safety is an important deciding factor in location selection

59% Of leisure travelers

56% Of business travelers

Moreover, value for money (56%) and culturally interesting destinations (40%) are attractive to travelers today.

56% Value for money

40% Culturally interesting

What are the most important factors when searching for a next travel destination?

	5 years ago	Today
Safe location	51%	58%
Value for money location	53%	56%
Culturally interesting destination	37%	40%
Guaranteed hot weather	28%	27%
Child / family friendly	26%	25%
No need for a visa or easy to obtain a visa	21%	22%
Sustainably responsible	17%	18%
Guaranteed cold weather	9%	9%

Inspiration Phase
Key Takeaways

Travelers confirm they are **most inspired by stunning landscapes and natural beauty** during the inspiration phase of a trip. High quality, mood-inspiring imagery is key for travel providers to consider as they promote services.

New channels are emerging to reach travelers during the inspiration phase - including across social media and through travel influencers - while the role of extended reality is also set to grow. **But different age groups and regions vary.** It is critical for travel providers to understand which audiences they are targeting and to pick the right channel to be most successful.

Safety is more important than ever for travelers when it comes to selecting a destination and is an area that destination marketing organizations and travel providers can work in tandem to address.

Booking Phase

When questioned on priorities when selecting a hotel for a trip abroad, a range of factors came into play for travelers. Nearly half (49%) saw 'price and value for money' as one of the most important features of a hotel. This trend was more pronounced among leisure travelers.

49% Price and value for money

'Location' was also important for 40% of travelers, alongside 'reviews and ratings' (30%), 'amenities' (25%) and 'brand' (25%). **British travelers were,** interestingly, **more focused on location than any other market**, with 55% citing this as a top priority when booking a hotel for an overseas trip.

Priorities when selecting a hotel:

- 40% Location
- 30% Reviews and ratings
- 25% Amenities
- 25% Brand

Priorities when selecting a hotel for business travelers:

- 20% Business center or appropriate workspace
- 19% Flexible room rental
- 13% Loyalty points

For business travelers, 'flexible room rental' (including early check-in or booking for less than 24 hours) was a top priority for 19%, while 20% were also seeking a 'business center or appropriate workspace'. Finally, **'loyalty points' were also a draw for 13% of business travelers - compared to 7% of leisure travelers**.

Sustainability, including carbon offsetting options, was cited as a factor in the hotel selection process by 9% of all travelers, rising to 13% among business travelers. Chinese (15%) and Indian (11%) travelers were among the most environmentally conscious.

Sustainability as a factor in the hotel selection process:

- 9% Of all travelers
- 13% Business travelers

What do travelers prioritize when selecting a hotel for a trip abroad?

	All respondents	Business Trips	Leisure Trips
Price and value for money	49%	35%	55%
Location	40%	32%	43%
Reviews and ratings	30%	29%	30%
Amenities (for example, pool, gym, spa)	25%	23%	26%
A brand I trust	25%	29%	23%
Family friendly	20%	20%	20%
Access to fast WIFI	18%	20%	17%
Ease of cancellations/ booking modifications	18%	17%	18%
Flexible room rental	15%	19%	13%
Sustainability (e.g. carbon offsetting options)	9%	13%	7%
Adults only	8%	9%	8%
Loyalty points	8%	13%	17%
Pet friendly	6%	6%	6%
A business center or appropriate workspace	5%	20%	0%

How do you tend to book for a trip abroad?

Online Travel Agencies lead the booking channel race

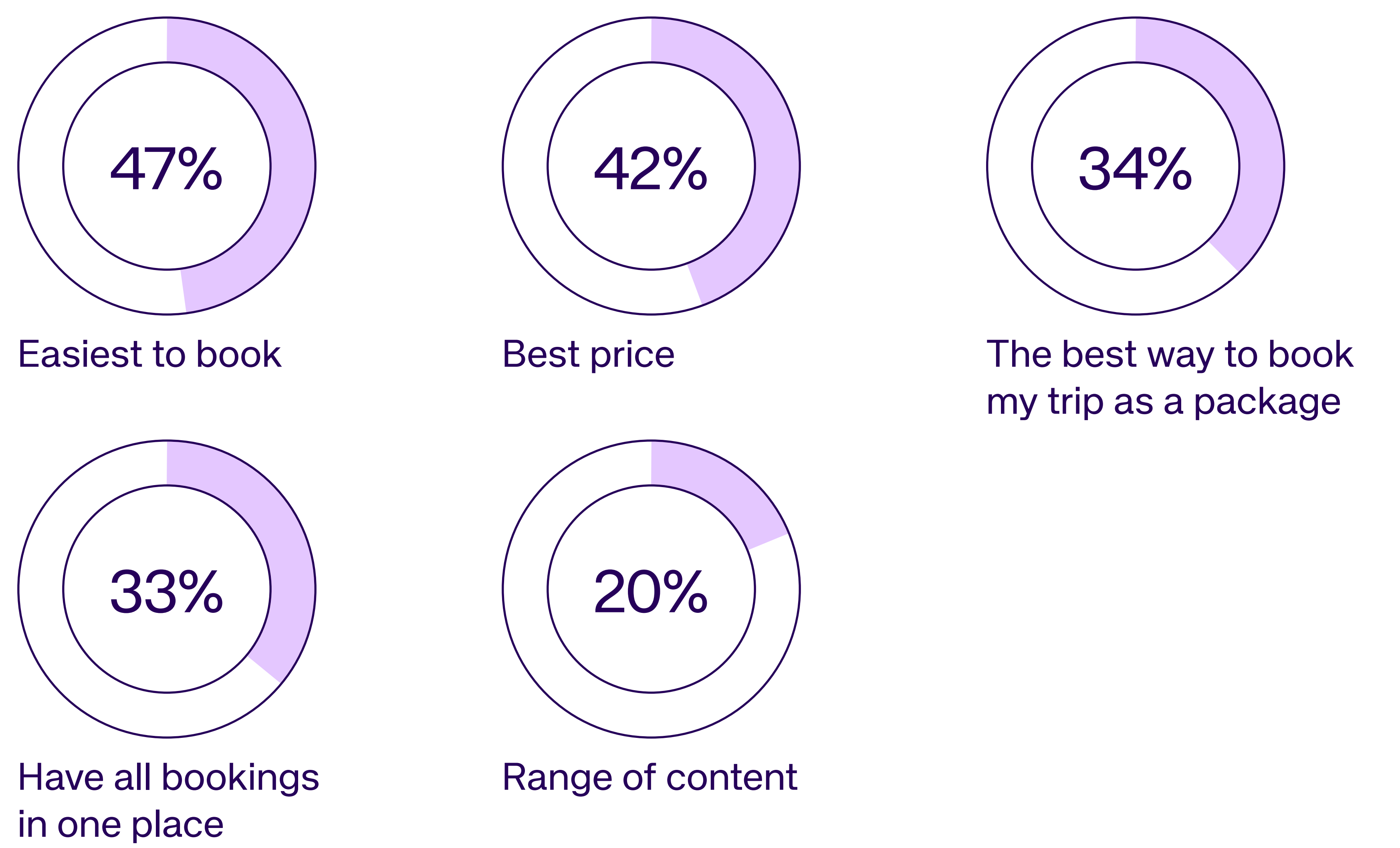
Online Travel Agencies (OTAs) are the most popular places to make a hotel booking, with 41% of both leisure and business travelers preferring this channel. A fifth of travelers (21%) make bookings directly through a hotel website.

Some 17% of travelers responded that they use a retail travel agent, with the channel most popular among senior travelers; 22% of Boomers prefer this method.

Retail agents - often those with a physical presence - were also more popular with leisure travelers, with 19% seeking out this route, compared to 12% of business travelers. On a market level, travelers from France were the most likely to book using in-person travel agents, with 23% doing so.

In response, **hotels must ensure content is available through the widest range of channels to meet travelers where they prefer to shop**.

Why do travelers select the booking methods they do? Simplicity. Some 47% of those questioned said they selected the method they did as it was the 'easiest to book'. 'Best price' (42%), 'the best way to book my trip as a package' (34%), 'have all bookings in one place' (33%) and 'range of content' (20%) were all also front of mind when it came to selecting a booking channel.



Travelers are enticed by – and willing to pay for – a range of extras

Hotels seeking to entice guests with additional services provided free of charge have a range of opportunities to choose from – with 98% of those questioned confirming the right amenities would make them more likely to book.

Breakfast

48%

of travelers said would make them more likely to book.

51% of leisure travelers

56% of Boomers

69% of Silent Generation

Most popular was breakfast, which 48% said would make them more likely to book. The figure rose to 51% among leisure travelers and stood at 56% among Boomers and 69% for the Silent Generation.

Which of the following amenities or services would make a traveler more likely to book a hotel for a trip abroad, if they were offered for free?

	All respondents	Business Trips	Leisure Trips
Breakfast	48%	41%	51%
WI-FI	38%	38%	38%
Airport shuttle	29%	27%	30%
A room upgrade	27%	31%	25%
Pool	26%	20%	28%
Early access to room or late check out included	25%	30%	23%
Your usual room and package being offered to you	17%	22%	15%
Onsite parking	16%	16%	16%
Fitness center	13%	19%	11%
Discount at the spa	12%	15%	11%
A concierge service	11%	17%	9%

Hotel features can add 12% to the average daily rates hotels charge

At the same time, hotel guests are also willing to pay more – often quite a lot more – for a range of add-ons.

Globally, travelers said they would pay on average 12% more than the Average Daily Rate (ADR) for specific amenities they want, including a particular floor or a service they require. **This could increase revenues by around US$5,383 per room, per year for the average mid-sized hotel chain** if they invest in making the best of their features or are creative about the extra services they offer.*

Globally travellers would pay

+ 12%

for specific amenities

14% of guests would pay up to

+ 20%

for business services

Could increase revenues by around

US$5,383

more per room, per year

Some 14% of guests would be willing to pay up to 20% more for business services, illustrating the importance of having the right tools while on the road.

This means, with the right preparation and technology in place, hoteliers will have a wide range of upsell opportunities in the future, as guests will be open to significantly increasing the value of each room.

"We have certainly seen interest in additional attributes of a property or services we can offer – and I believe there is huge potential in this area.

"We have seen particular interest in offering things like club lounges and early check-in for people attending a wedding or event where they need to get in the room early, for example. It's those additional touches that can make the difference."

Linda Gulrajani
VP Revenue Strategy and Distribution, Marcus Hotels

> "We have looked at new innovations, such as a self-care minibar, offering skin care, eye masks and those kinds of treatments. Going above and beyond what guests would normally expect. Not only does this take care of a need the guest has, but it saves time also having to leave the hotel to find these amenities locally.
>
> "However, we could take this process further, offering a menu of opportunities, ideas that guests might not have thought of themselves."
>
> **Amy Isbel-Williams**
> Director of Lodging Operations, Geronimo Hospitality Group

How much would a traveler be willing to pay on top of the standard hotel cost to have each of the following add-ons during a trip abroad?

Business services like printing
13.4%

A specific view
12.3%

Additional services (e.g. in room massage, in room hairdresser)
12.4%

Packages for local attractions
12.3%

A mobile device that would give me access to cheap wifi outside of the hotel
11.8%

A specific floor in the hotel
11.7%

Additional entertainment (e.g. Xbox or particular premium TV channels)
11.6%

Early or late check out
11.1%

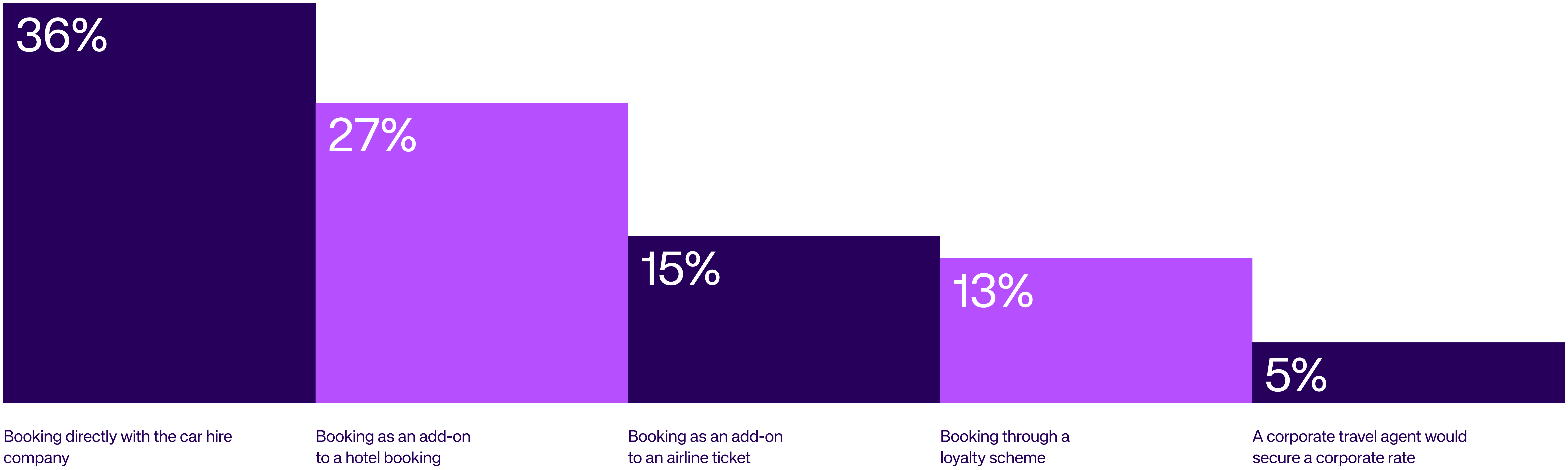
Adding car rental and travel insurance to create a complete trip

Nearly three-quarters of travelers said they have added car hire to their bookings abroad in the past, and in this context, direct booking remains king. When asked where they got the best deal when booking a vehicle for a trip abroad, 36% of those who hire cars said they got the best deal by 'booking directly with the car hire company'.

This was followed by 'booking as an add-on to a hotel booking' (27%), 'booking as an add-on to an airline ticket' (15%), 'booking through a loyalty scheme' (13%) and 'a corporate travel agent would secure a corporate rate' (5%).

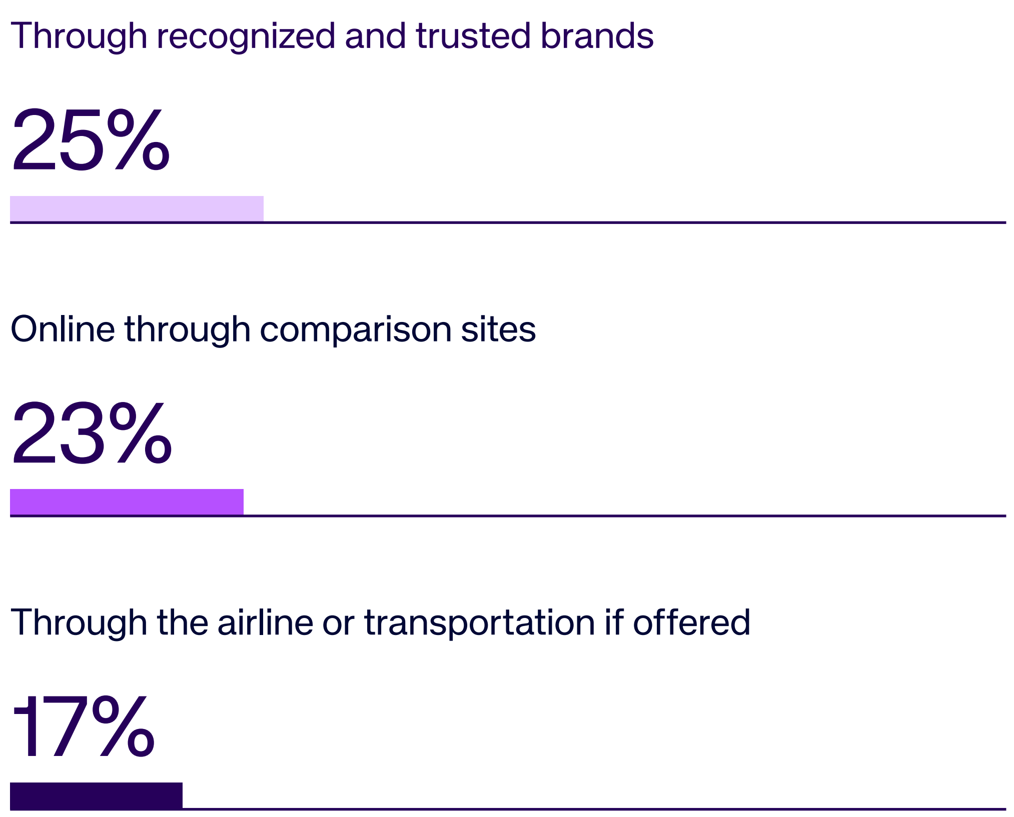
This suggests that many in the car rental market are open to securing a vehicle as part of a wider deal, either with an airline or hotel, potentially presenting wider merchandising and commission opportunities for hoteliers.

Where they got the best deal when booking a vehicle for a trip abroad?

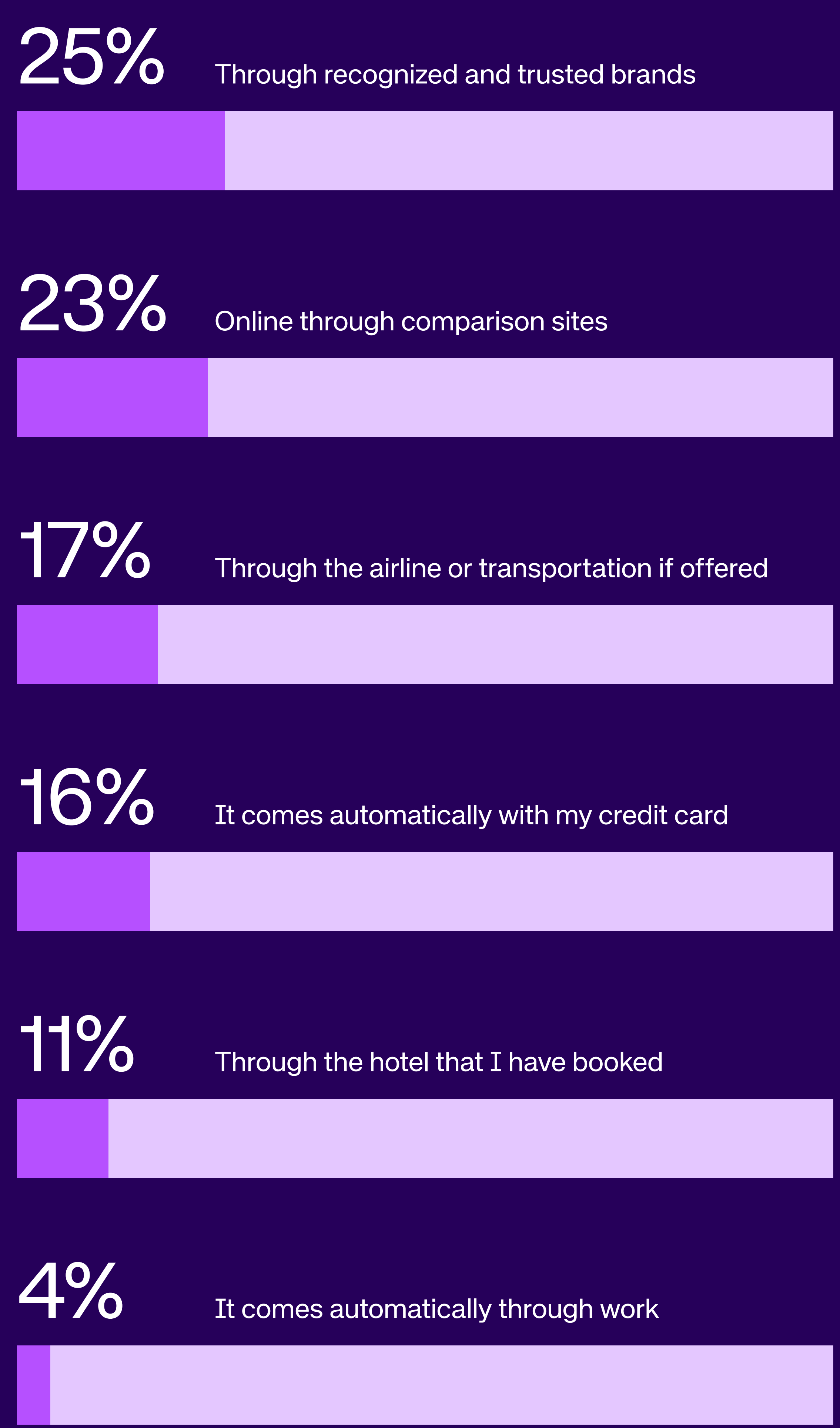


Direct booking is also popular in the travel insurance market, with 25% of those who book travel insurance doing so ‘through recognized and trusted brands’. ‘Online through comparison sites’ (23%) was next, followed by ‘through the airline or transportation if offered’ (17%).

British travelers are the most likely to book travel insurance, with 59% of Brits saying they ‘always’ buy it, compared to a global average of 30%, making them almost four times as likely to ‘always’ get travel insurance as compared to Americans.



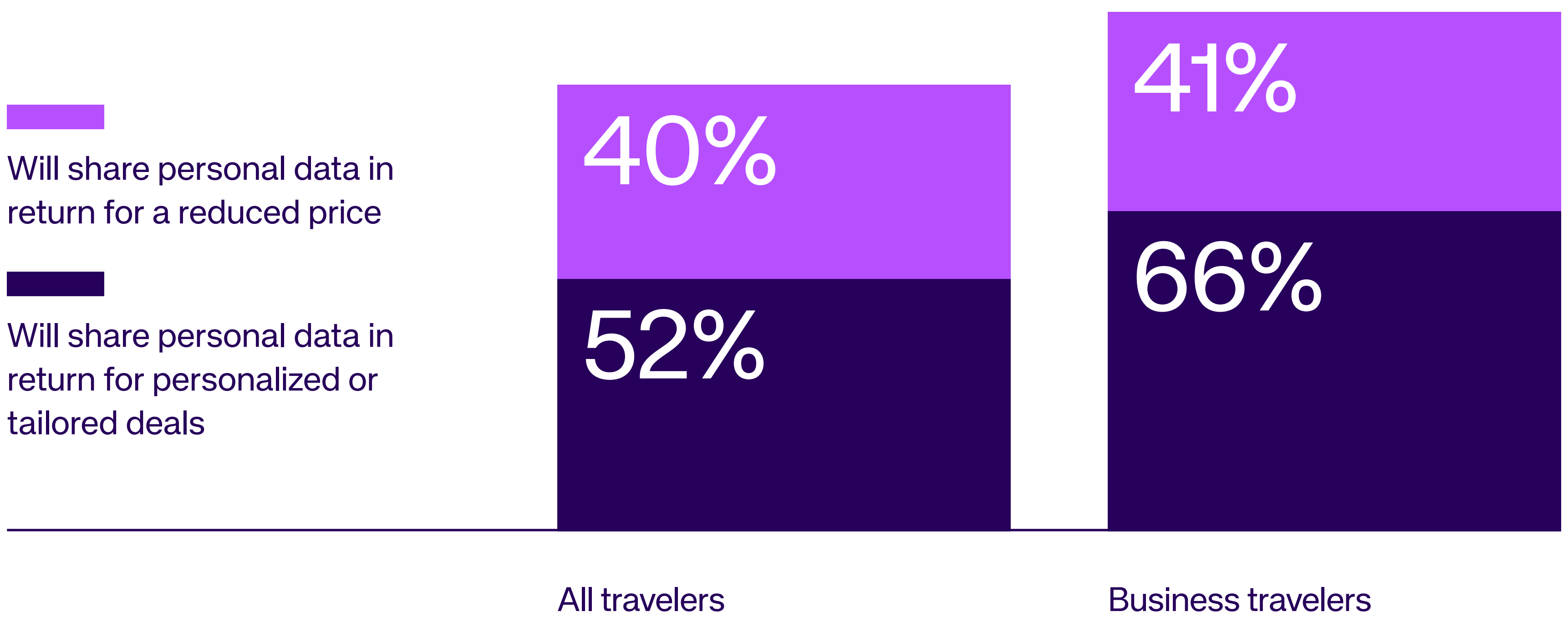
How do travelers buy insurance for trips abroad?

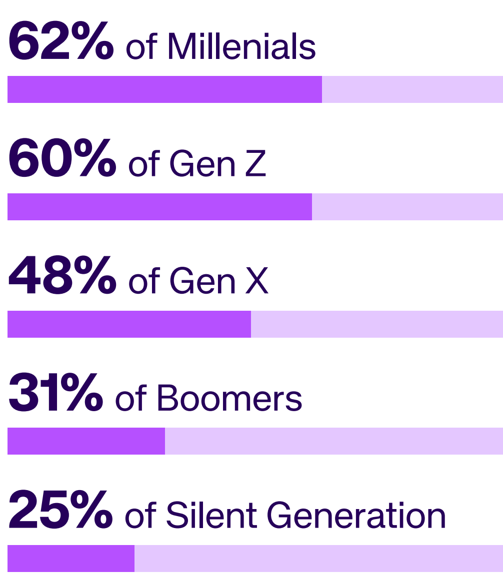


Travelers open to sharing personal information for lower prices – and custom offers

Access to a greater depth of data presents real opportunities for the travel industry, allowing hoteliers to understand preferences, tailor marketing, offer dynamic prices and effectively allocate resources on site.

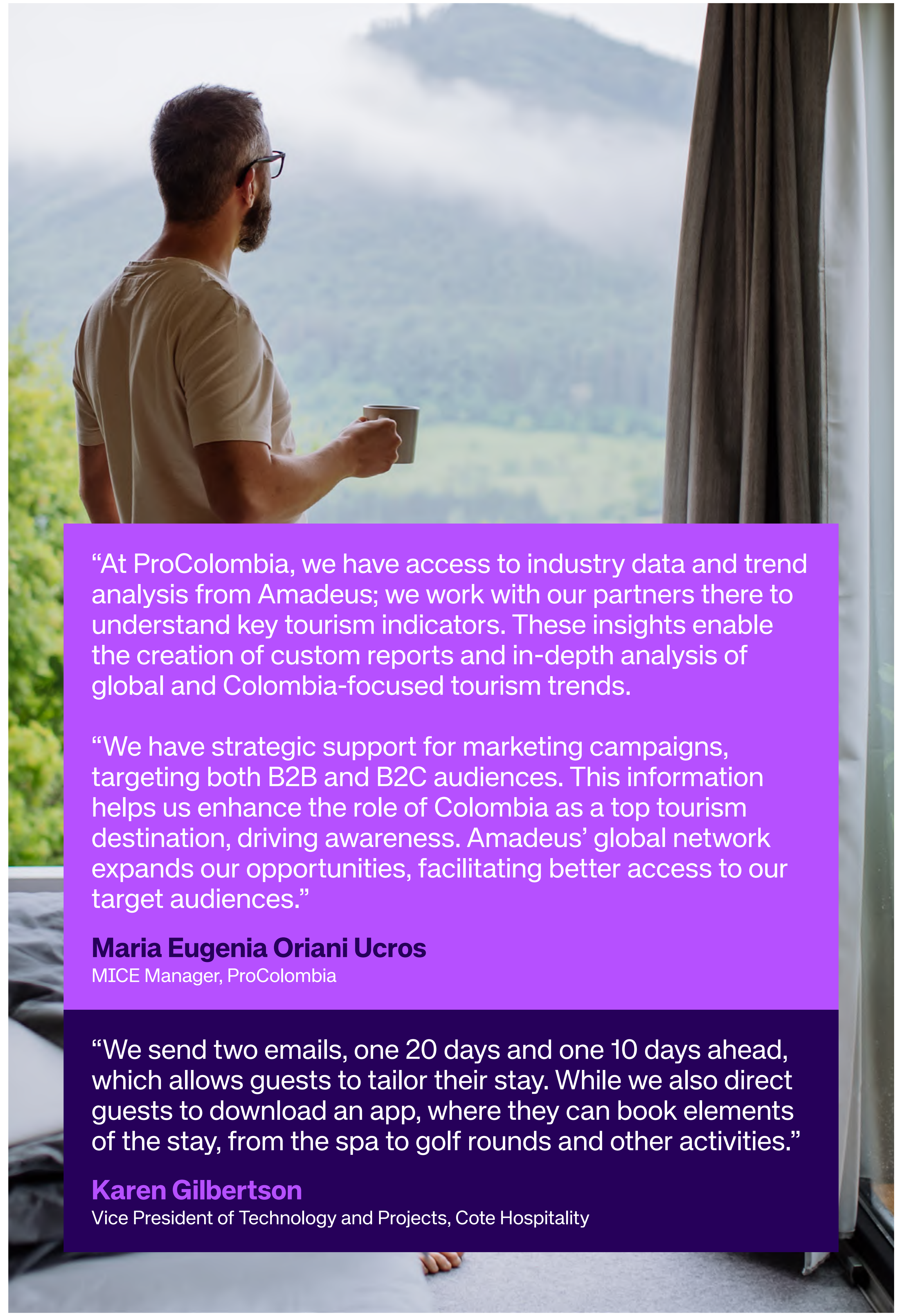
Over half of guests (52%) said they would be willing to share personal data in return for personalized or tailored deals, with 40% open to doing so for a reduced price. Among business travelers, the figures are even more pronounced, with 66% willing to share personal information in exchange for a personalized offer and 41% open to doing so for a reduced price.





Personalized offers are also of interest to younger travelers, with 60% of Gen Z and 62% of Millennials willing to share data with hotels in exchange for a tailored offering, falling to 48% among Gen X, 31% among Boomers and 25% among the Silent Generation. In terms of market, **Chinese (73%) and Indian (65%) guests were most open to sharing personal information with hotels in return for personalized offers**.

Travel Dreams research finds **personalization is key, with travelers open to sharing data to bring opportunities to life.**



"At ProColombia, we have access to industry data and trend analysis from Amadeus; we work with our partners there to understand key tourism indicators. These insights enable the creation of custom reports and in-depth analysis of global and Colombia-focused tourism trends.

"We have strategic support for marketing campaigns, targeting both B2B and B2C audiences. This information helps us enhance the role of Colombia as a top tourism destination, driving awareness. Amadeus' global network expands our opportunities, facilitating better access to our target audiences."

Maria Eugenia Oriani Ucros
MICE Manager, ProColombia

"We send two emails, one 20 days and one 10 days ahead, which allows guests to tailor their stay. While we also direct guests to download an app, where they can book elements of the stay, from the spa to golf rounds and other activities."

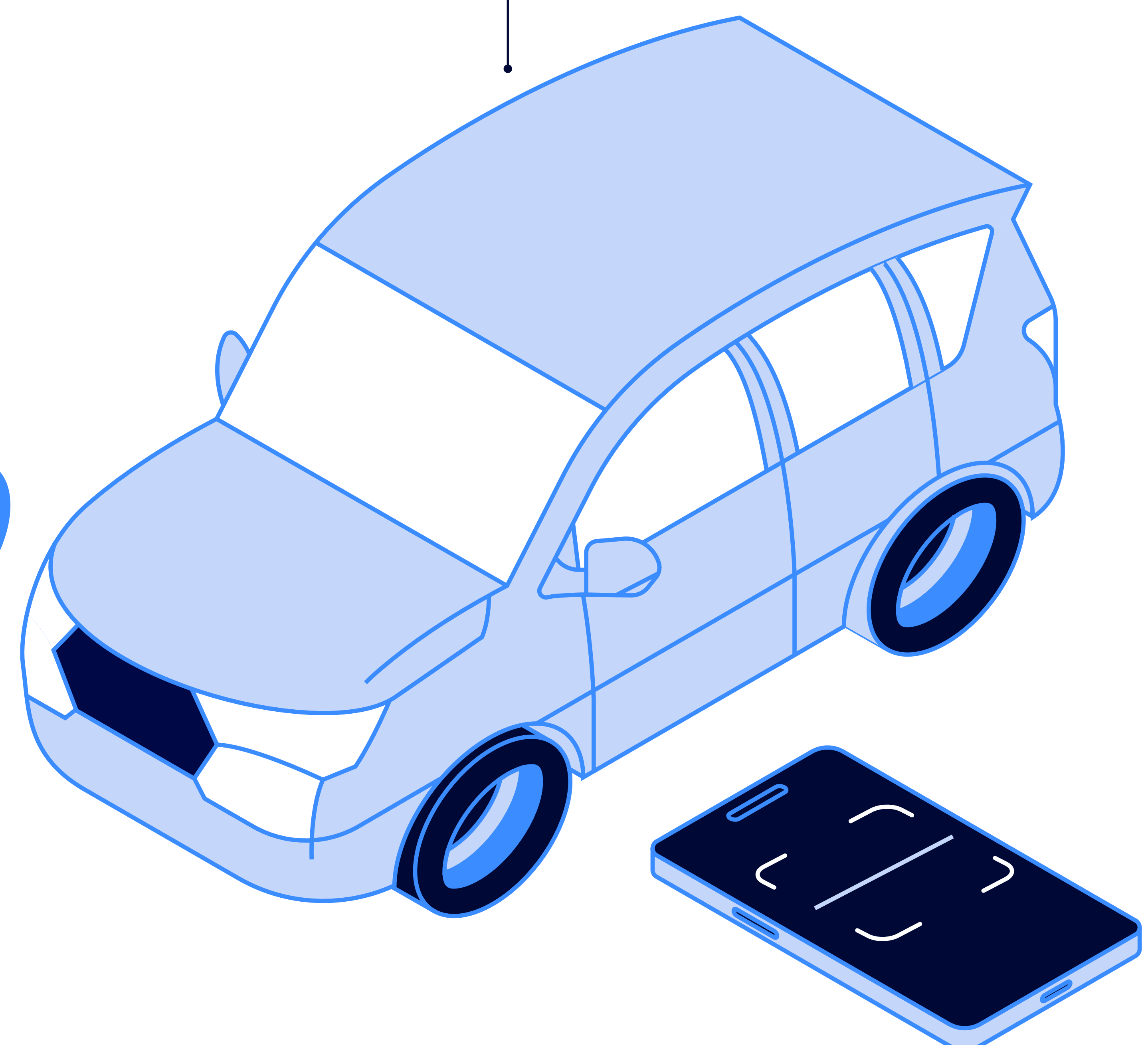
Karen Gilbertson
Vice President of Technology and Projects, Cote Hospitality

Booking Phase
Key Takeaways

Price, value for money and location are among the most important deciding factors for guests looking for a hotel – with sustainability more important to guests from China and India.

Guests are willing to pay significant amounts for amenities such as views, specific floors and additional services such as an Xbox or high-end entertainment packages. This presents significant upsell opportunities for hoteliers with the right capabilities in place to capitalize on this trend.

Travelers are open to bundling car hire and insurance purchases with a hotel booking to achieve simplicity and have everything in one place. This presents interesting commission opportunities for hoteliers and travel sellers.



Travelers are also open to sharing data in return for personalized offers, meaning, with the right incentives, travel providers can grow their customer knowledge to better meet traveler needs.

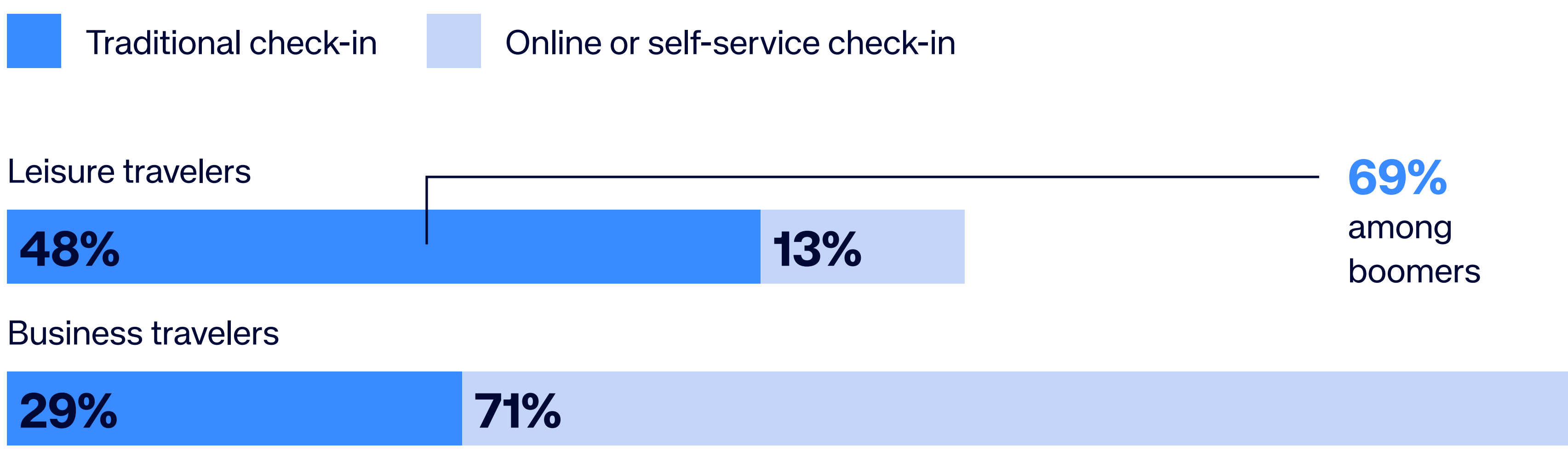
On-trip

During the trip itself, *Travel Dreams* reveals there is still an important role for the human touch, especially for leisure guests.

Asked about the ideal hotel check-in experience when traveling abroad, nearly half (48%) of all leisure guests indicated a firm preference for 'a traditional check-in desk with a person to talk me through the hotel amenities'. The figure rose to 69% among Boomers, who are generally keener to be welcomed by hotel staff.

Only 13% of leisure guests opted for a check-in process with no staff support at all.

There are, however, new opportunities to satisfy the expectations of business travelers with technology. Only 29% want a traditional check-in process, whereas 71% of business travelers are keen for a form of online or self-service check-in. While leisure travelers still want a more personal arrival experience, business travelers are open to a much greater role for technology in a variety of ways.



These differences in preferences are important for guests **and can be a point of significant friction** with the hotel **if the target guest is not correctly understood.**

"Our people are our most important asset, and we pride ourselves on the level of service our guests receive – we want each guest to feel as though they are the only people we are serving. This is particularly critical in smaller markets, where word-of-mouth is very important – when you reliably provide the best experience time and time again, that is a real asset for a hotel.

"Our team works to make sure every guest is seen, heard and recognized – listening to understand if there is any way we can improve a stay in our hotel. This makes those organic opportunities to interact with guests, like check-in, vital.

"Business travelers, on the other hand, may prefer a digital key, to bypass the front desk and not interact with anybody during an entire stay – and that is something we can do as well."

Maddy Bauman
VP of Hospitality Sales, Hegg Companies

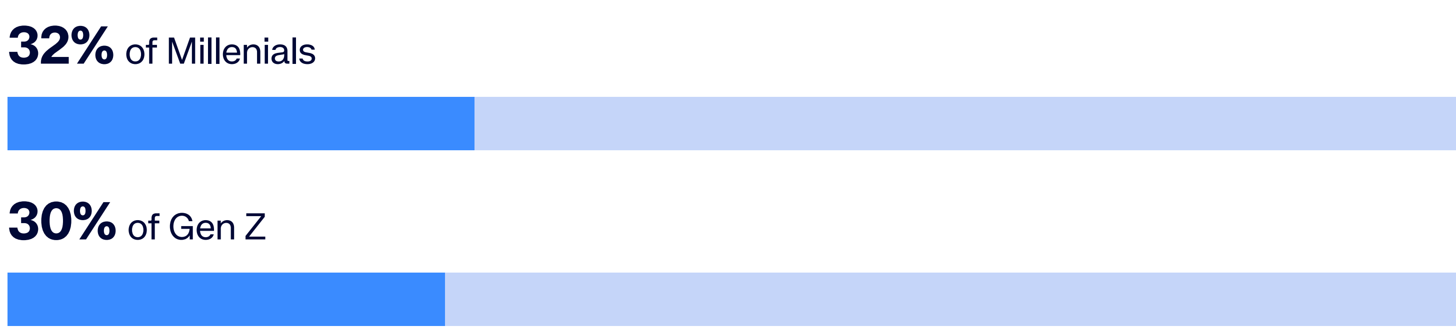
Seamless logistics, interactive tours and AI-enabled assistants wow guests

Once checked in, guests are open to a range of technologies designed to improve a stay – with business travelers again most excited by new opportunities.

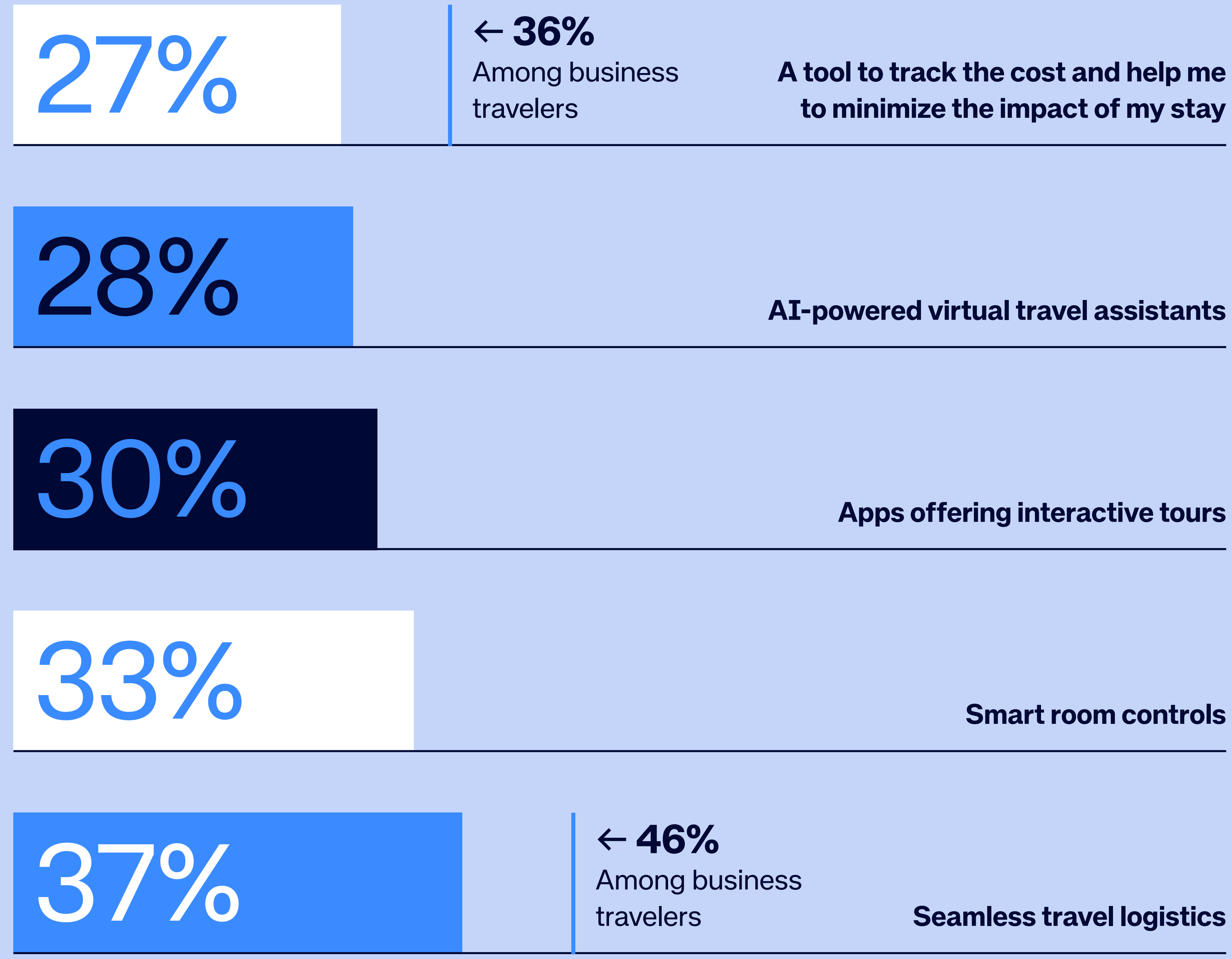
Travelers seek ‘seamless travel logistics’ as the most popular technical innovation, with 37% believing this would improve a journey, rising to 46% among business travelers.

The potential of smart room controls (33%), apps offering interactive tours (30%) and AI-powered virtual travel assistants (28%) were also prized by all travelers, with larger numbers of business travelers again seeking each innovation.

From a sustainability perspective ‘a tool to track the cost and help me to minimize the impact of my stay’ was of interest to just under a third of guests (27%), rising to 36% among business travelers. Such a tool would be of most interest to younger travelers, with 30% of Gen Z and 32% of Millennials open to new solutions of this kind.

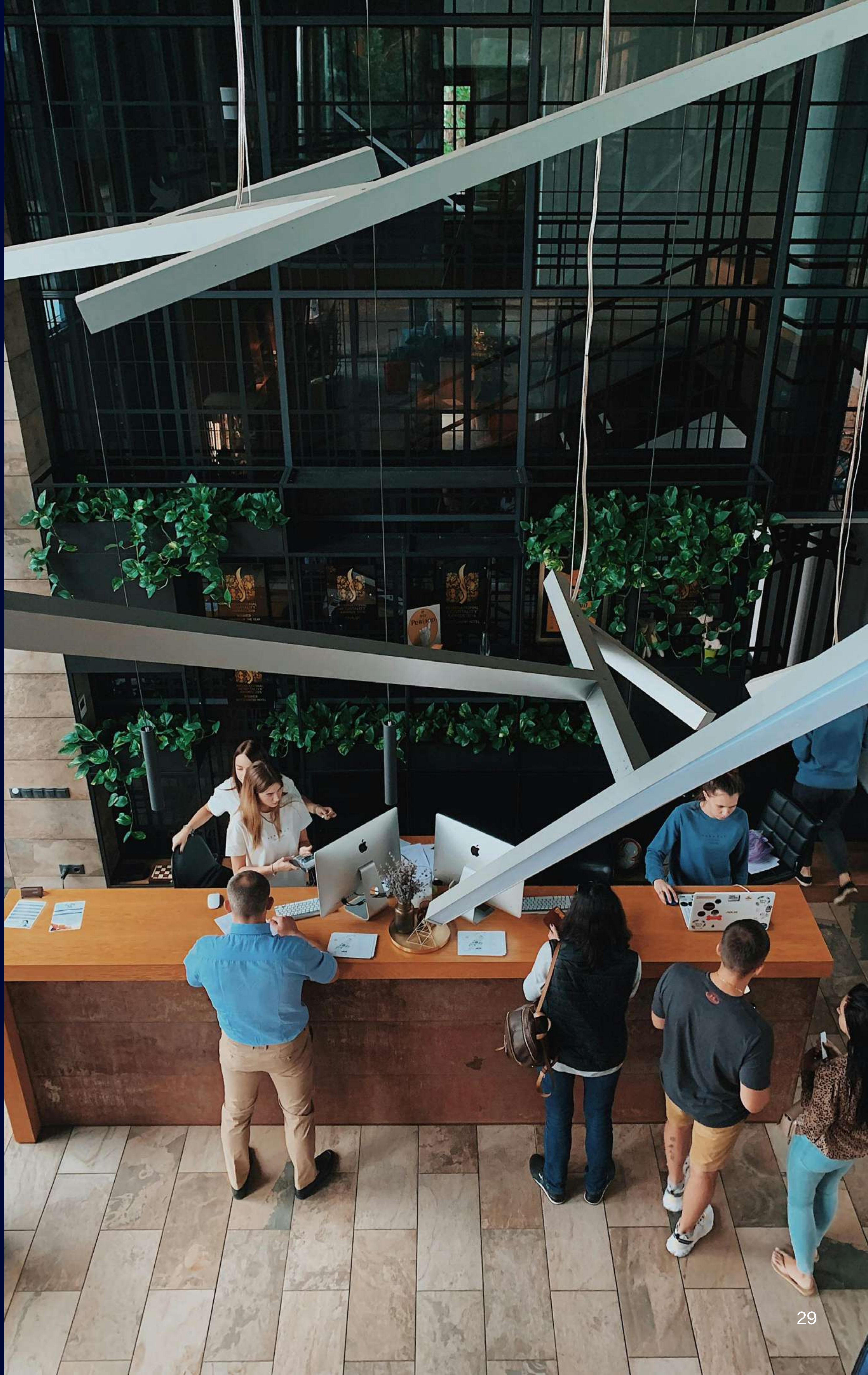


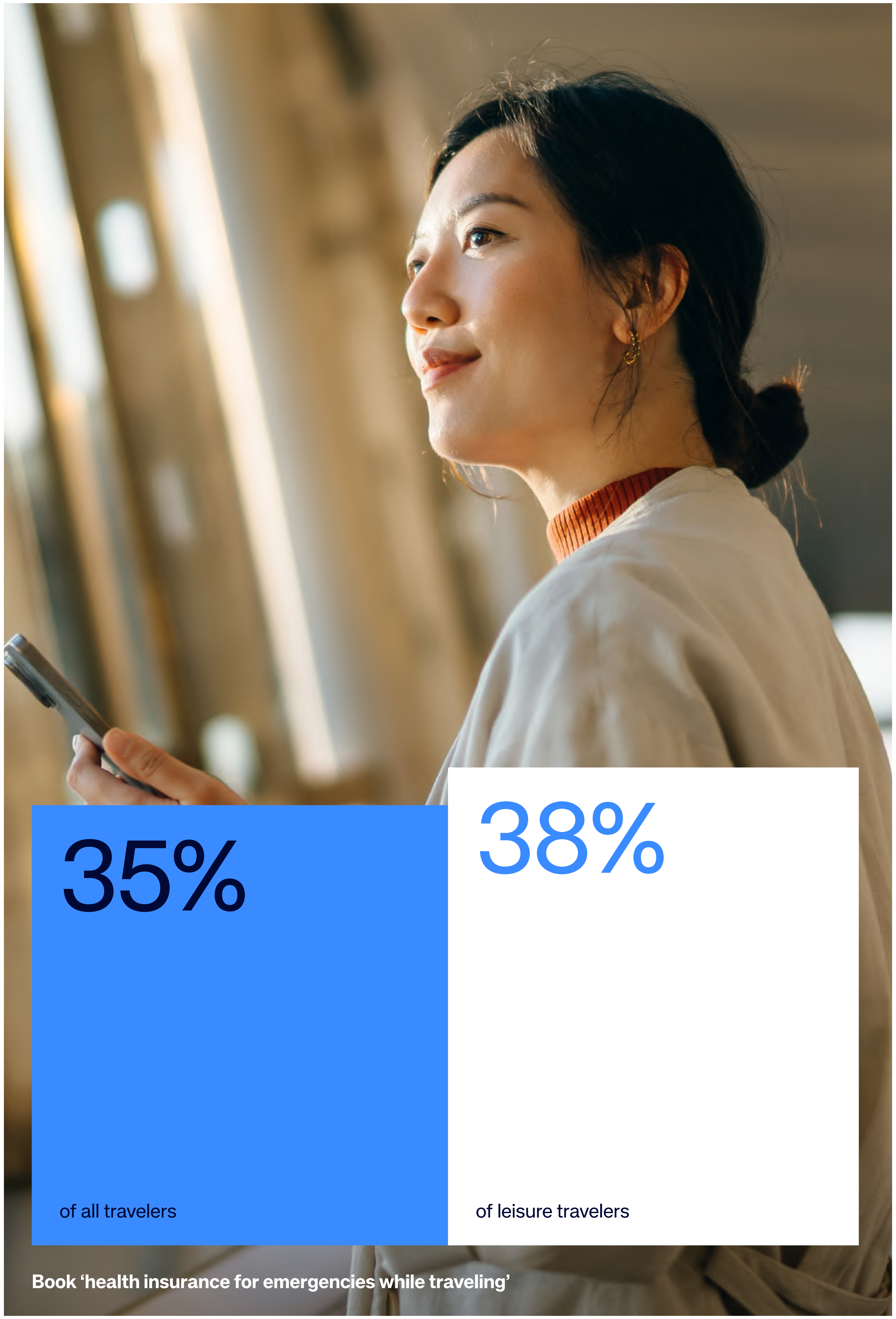
This suggests **environmental concerns are having an impact on the travel experience, especially among young guests** who are open to new technology in order to reduce the impact of their trip.



Which of these technologies would improve a stay at a hotel while you are abroad?

	All travelers	Business travelers	Leisure travelers
Seamless travel logistics supported with automatic updates and assistance on flight delays, luggage tracking or transport coordination	37%	46%	34%
Smart room controls available for my mobile or tablet device (for example adjusting room lighting, temperature or television)	33%	48%	28%
An app that provides an interactive tour of my room and hotel facilities	30%	40%	26%
An AI powered virtual personal travel assistant or concierge offering personalized information based on my profile	28%	42%	22%
A tool to track the cost and help me to minimize the impact of my stay	27%	36%	23%
An AI powered chatbot service for questions about my hotel or destination	25%	38%	20%





Non-insured travelers risk losing an average of US$1,210 – and potentially much more

If things go wrong on a trip, travel insurance can offer many solutions. Of those who book insurance, many reasons for doing so were cited, led by ‘health insurance for emergencies while traveling’ (35%). This was the most important for both business and leisure travelers, but even more significant for the latter, 38% of whom cited it as a reason for buying insurance.

If a traveler becomes ill overseas, they are seeking reassurance that help will be at hand – and costs will not spiral to become unaffordable.

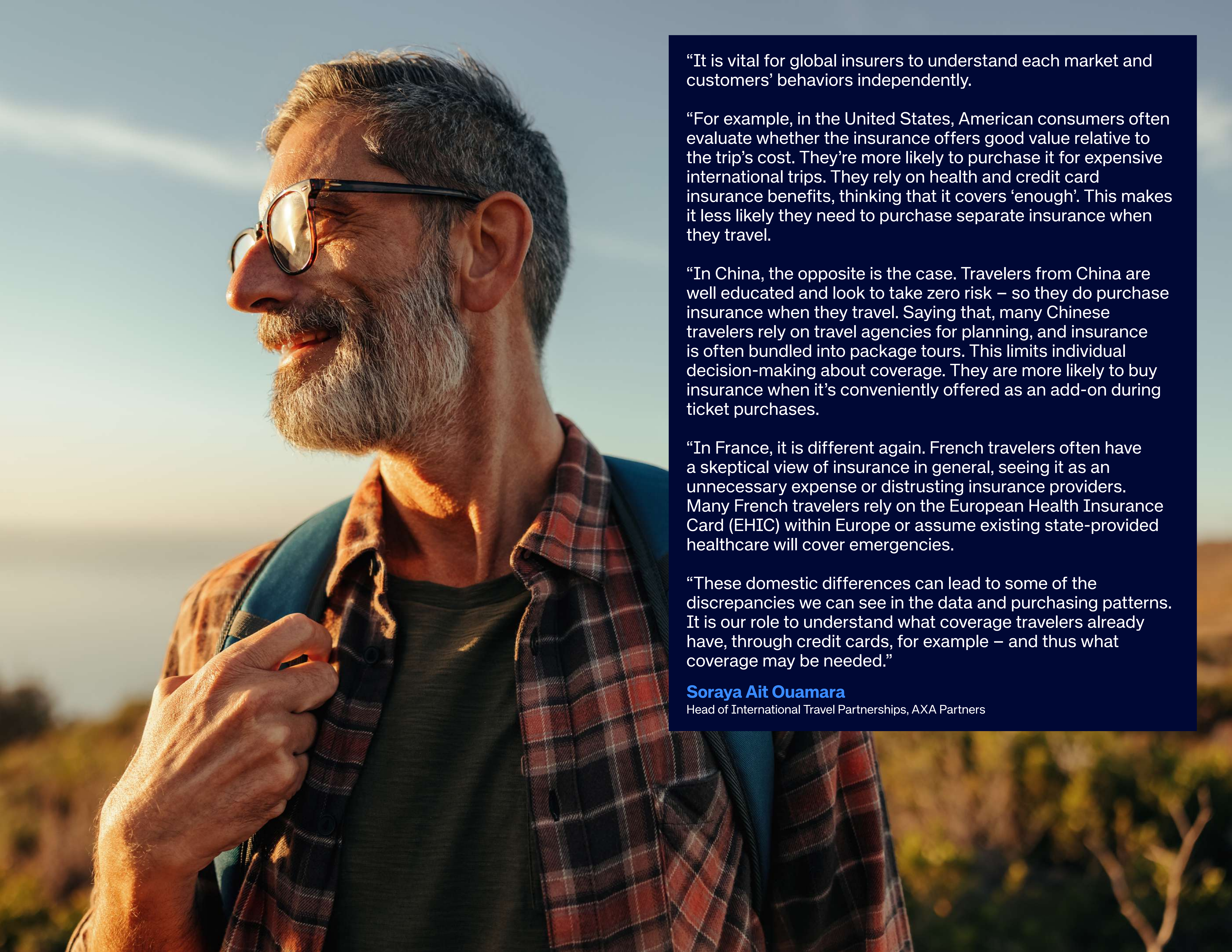
The risks of forgoing insurance:

All travelers	Leisure travelers	Business travelers
US$1,210	US$1,476	US$1,077

The risks of forgoing insurance were also highlighted by the research. When asked how much they had personally lost due to not having insurance, answers were illuminating. The average loss for people uninsured stood at US$1,210 –a substantial sum. Among leisure travelers, the figure was US$1,476 and for business travelers, US$1,077.

Of even more concern, **6% of travelers said they have lost over US$2,500** due to not having insurance, with some losing significantly more.

Not only does having travel insurance prove invaluable in a range of circumstances; **opting not to travel with insurance can carry significant risks**.



"It is vital for global insurers to understand each market and customers' behaviors independently.

"For example, in the United States, American consumers often evaluate whether the insurance offers good value relative to the trip's cost. They're more likely to purchase it for expensive international trips. They rely on health and credit card insurance benefits, thinking that it covers 'enough'. This makes it less likely they need to purchase separate insurance when they travel.

"In China, the opposite is the case. Travelers from China are well educated and look to take zero risk – so they do purchase insurance when they travel. Saying that, many Chinese travelers rely on travel agencies for planning, and insurance is often bundled into package tours. This limits individual decision-making about coverage. They are more likely to buy insurance when it's conveniently offered as an add-on during ticket purchases.

"In France, it is different again. French travelers often have a skeptical view of insurance in general, seeing it as an unnecessary expense or distrusting insurance providers. Many French travelers rely on the European Health Insurance Card (EHIC) within Europe or assume existing state-provided healthcare will cover emergencies.

"These domestic differences can lead to some of the discrepancies we can see in the data and purchasing patterns. It is our role to understand what coverage travelers already have, through credit cards, for example – and thus what coverage may be needed."

Soraya Ait Ouamara
Head of International Travel Partnerships, AXA Partners

Sustainability concerns gain traction in vehicle hire

Concerns about the environment are most starkly illustrated in the car rental sector. Here the number of travelers citing 'having a range of electric or hybrid cars' as an important factor in deciding to use a hire car company has increased from 18% to 25% over the past five years – a near 40% increase.

Electric or hybrid cars were also more important for younger travelers, with 28% of Gen Z travelers seeing a range as a deciding factor today, compared to 16% of Boomers. Similarly, more Chinese travelers (35%) saw hybrid vehicles as an important factor in car rental today, more than in any other market.

28% Of Gen Z travelers

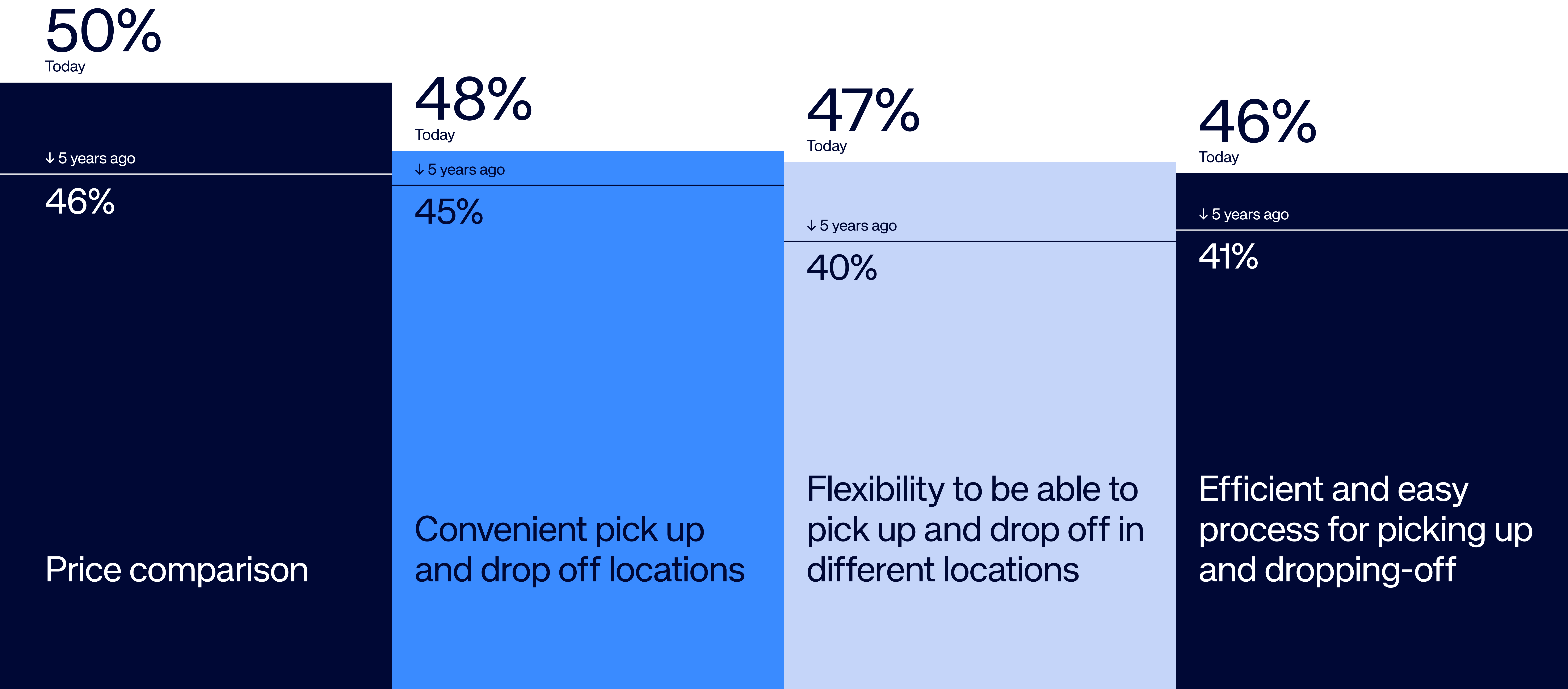
16% Of Boomers

Over the same timeframe, the number of travelers citing 'having a range of petrol or diesel cars' on offer as a deciding factor fell from 27% to 22%, illustrating a gradual transition toward less environmentally damaging vehicles.

	5 years ago	Today
Having a range of electric or hybrid cars	18%	25%
Having a range of petrol or diesel cars	27%	22%

Elsewhere in the vehicle rental market, there has been more stability, with 'price comparison' still the most important deciding factor (rising from 46% five years ago to 50% today). This was followed by 'convenient pick up and drop off locations' (up from 45% to 48%), 'flexibility to be able to pick up and drop off in different locations' (up from 40% to 47%) and 'efficient and easy process for picking up and dropping off' (up from 41% to 46%).

Overall, while sustainability is growing in importance for travelers looking to rent a vehicle, the trump card in this market remains simplicity.



"There is a massive expectation on Europcar, being in the industry that it is in, to be sustainable and environmentally conscious. In our UK operations, for example, we have recently been through an annual carbon reduction program, recognized by Ecovadis, where we received a Platinum sustainability rating. We have been able to reduce our carbon emissions for the past 13 years in a row, and Europcar UK is currently in the top 1% of performers across all companies in all industries across the Ecovadis database.

"This is a big focus for us; we are using chemicals to clean the vehicles; we are transporting them around the country. Anything and everything we can, therefore, do to reduce our impact as a business is a positive.

"We have agreements in place to incorporate electric vehicles into our fleets, but there are challenges we cannot combat alone. For example, we cannot overcome a country-wide infrastructure gap when it comes to charging points.

"Europcar is also investing in connected vehicles, which allows us to be more efficient in our understanding of which vehicles are located where, how much fuel is in each vehicle, allowing us to be cleverer with our logistics."

Paul Westgate
Head of B2B Brand Experiences, Europcar

What travelers want to know about a destination before they go

54%
The best places to eat

49%
How to get around

44%
Safety tips

43%
Hidden gems and off the beaten track attractions

22%
Public transport availability and infrastructure

20%
Great cultural options

18%
Tours and tour guides that speak my language

12%
Access to medical care if needed

12%
People who speak my language

Before setting off on a journey, travelers are careful to research a lot of information about a destination. What do they want to know? Knowledge on ‘the best places to eat’ (54%) was a priority for many, while travelers also wanted to know ‘how to get around’ (49%), ‘safety tips’ (44%) and about ‘hidden gems and off the beaten track attractions’ (43%).

When arriving at a destination, travelers are looking for a range of services and opportunities, led by ‘public transport availability and infrastructure,’ sought by 22% of travelers.

‘Great cultural options’ (20%), ‘tours and tour guides that speak my language’ (18%), ‘access to medical care if needed’ (12%) and ‘people who speak my language’ (12%) were also wanted.

“We work with Amadeus to enhance air connectivity and drive ticket sales, including airlines as third-party partners in our marketing efforts. This strengthens our promotional reach, and secures ticket sales to Colombia.

“Airline reservation data from Amadeus allows us to understand where travelers originate – giving a deeper understanding of source markets. A lot of travelers arrive in Colombia from the United States, but they do not all originate there, so this data lets us see where they began their journeys.

“This helps us make decisions on our marketing campaigns, helping us drive more seats and frequencies into Colombia, and even new routes.”

Maria Eugenia Oriani Ucros
MICE Manager, ProColombia

On-trip
Key Takeaways

Guests in the leisure sector are positive about wanting to take the time **to be personally welcomed by the hotel when they check in.**

Business travelers are open to a range of new experiences that will help improve the efficiency of their interactions, such as online check-in, keyless access and self-service kiosks.

Seamless travel logistics, smart room controls, apps offering interactive tours and AI-powered virtual travel assistants are among the most sought-after innovations.

Uninsured travelers have lost an average of US$1,210 during a trip – highlighting the risks of traveling without it.

Sustainability – in the form of hybrid cars – is becoming increasingly sought after in vehicle hire.

Post-trip

Reflections and Dreams for the Future

Thinking about return trips to properties they have visited, travelers display expectations consistent with those revealed during the inspiration phase.

'Value for money' is the key influence on the decision-making process, selected by 61% of all travelers – and rising to 65% among leisure travelers. 'Cleanliness of the room and facilities' (57%) and 'great customer service' (52%) round out the top three factors impacting a traveler's decision to return to a hotel.

65% among leisure travelers

↑

61%
Value for money

57%
Cleanliness of the room and facilities

52%
Great customer service

When breaking the findings down by sector, several factors influence business travelers more than their leisure peers.

'Getting access to the room as soon as I wanted' was valued by 38% of business travelers and 32% of leisure travelers. Moreover, 'receiving a package that is personalized' was important to 35% of business travelers, and just 22% of those traveling for leisure, while loyalty points were valued by 32% of business travelers and 19% of leisure travelers.

	Business travelers	Leisure travelers
Getting access to the room as soon as I wanted	38%	32%
Receiving a package that is personalized	35%	22%
Loyalty points	32%	19%

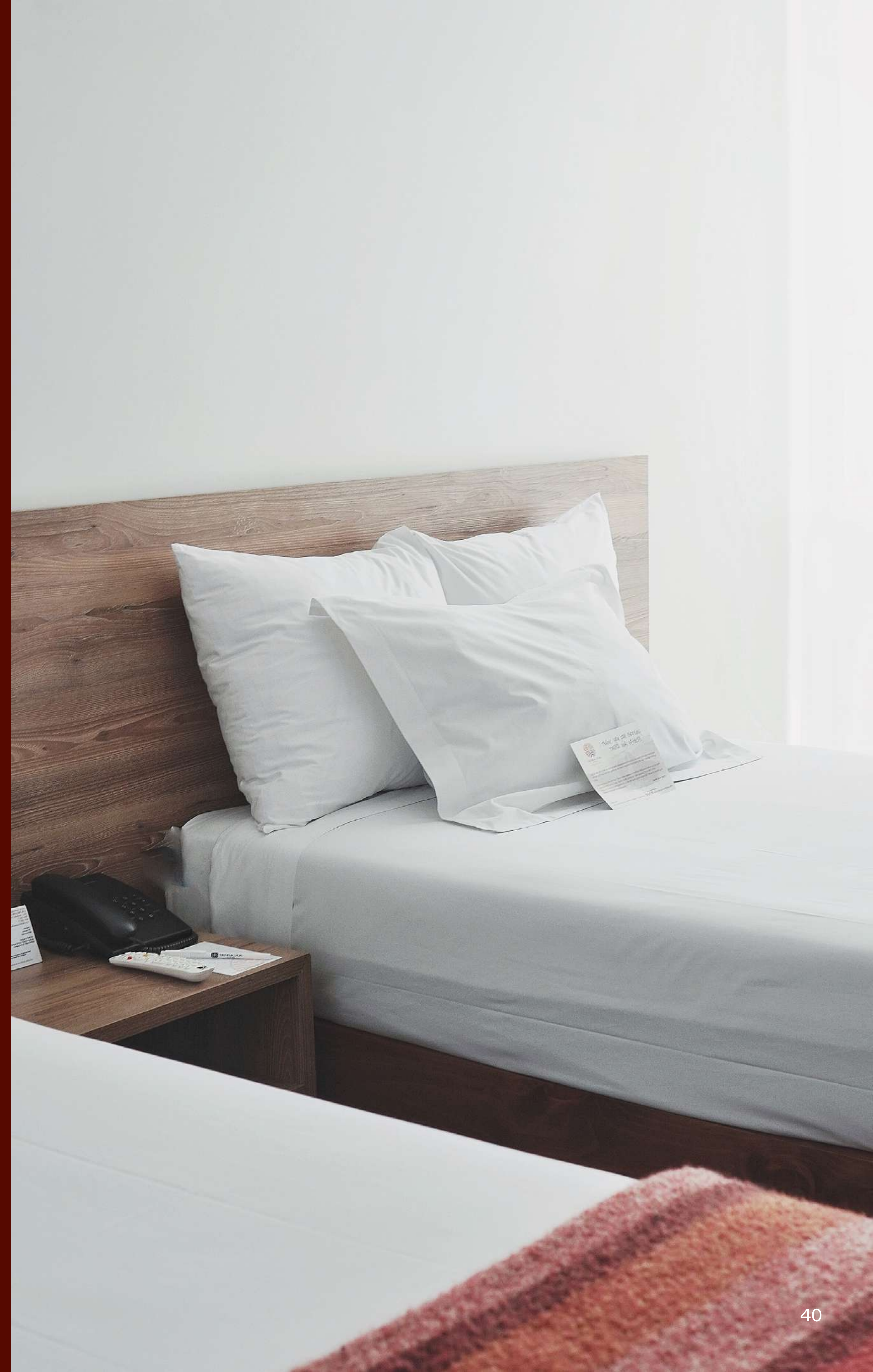
Both groups, then, are looking for value, cleanliness, and service, but **business travelers also seek efficiency, personalization and the recognition of loyalty**.

"Some 60% of our leisure guests are now repeat customers and are hugely loyal to us. I would say that personalization is the key to our success. We dissect the DNA of the hotel so that we can match what our guests want with what we have to offer. This goes for the way we market our attributes and the type of service we deliver, right the way through to the level of technology we offer."

Alexander Jovanovic
General Manager, Trans Resort Bali

What factors would most influence a decision to visit a hotel abroad again?

	All travelers	Business travelers	Leisure travelers
Value for money	61%	50%	65%
Cleanliness of the room and facilities	57%	50%	60%
Great customer service	52%	48%	54%
Fast check-in and check-out	37%	42%	35%
Getting access to the room as soon as I wanted it	34%	38%	32%
Good local advice and insights at check-in	33%	34%	32%
Receiving a package that is personalized to me	26%	35%	22%
Loyalty points	23%	32%	19%
Complimentary items like wine and chocolates	23%	29%	20%



How can hotels build the ideal future experience?

A range of further factors were cited by guests when considering how to build the ideal hotel experience on a future international trip. Chief among them was 'more personal service,' with 50% of leisure guests looking for the hotel to know them better, interact with them 'person-to-person' and welcome them individually.

'Enhanced wellness offerings,' including on-site spas, fitness programs and mental health retreats were also sought by 44% of all travelers, with similar levels of demand from leisure and business travelers.

Differentiation between the sectors was, however, seen in a number of notable areas. Business travelers are open to 'more technology,' including AI-personalization. Some 41% of business travelers saw this kind of technology as part of an ideal future stay, compared to only 28% of leisure travelers. At the same time, business travelers cited 'a focus on sustainability, including eco-friendly practices and green certifications' as a component of an ideal stay, with 36% seeking more environmentally friendly options, compared to 27% of leisure travelers.

Nearly a quarter (22%) of business travelers also want the option of paying with crypto or a digital wallet, versus 15% of leisure travelers.

The divergence in requirements makes it essential for travel providers to deeply understand target guests to make sure they are balancing the right level of technology with personal service.

More personal service

50%
Leisure travelers

Enhanced wellness offerings

44%
All travelers

More technology

41% Business travelers
28% Leisure travelers

A focus on sustainability, including eco-friendly practices and green certifications

36% Business travelers
27% Leisure travelers

The option of paying with crypto or a digital wallet

22% Business travelers
15% Leisure travelers

Travelers are open to AI assistance

With AI never far from the headlines, the vast majority of travelers are open to help when it comes to building future trips. Indeed, just 13% of travelers **'would not trust AI to recommend things to me at all'**. The figure falls to 3% among Gen Z and just 1% among Chinese travelers.

Very few travelers would not trust AI to recommend anything:

13% Of all travelers

3% Of Gen Z travelers

1% Of Chinese travelers

Travelers are today looking for help in a variety of ways, including 'showing me the best places for dinner at my destination' (50%) and 'inspiration and helping me work out where to go' (40%). Both possibilities were also welcomed by larger numbers of business travelers, with 60% open to culinary recommendations and 51% looking for help with where to go.

Large numbers of business travelers were also open to AI assistance with 'making bookings for me' (54%) and 'discovering the best entertainment venues' (50%). Nearly a fifth (18%) of travelers would also trust AI to 'write a review of a dinner or hotel they experienced on their trip'.

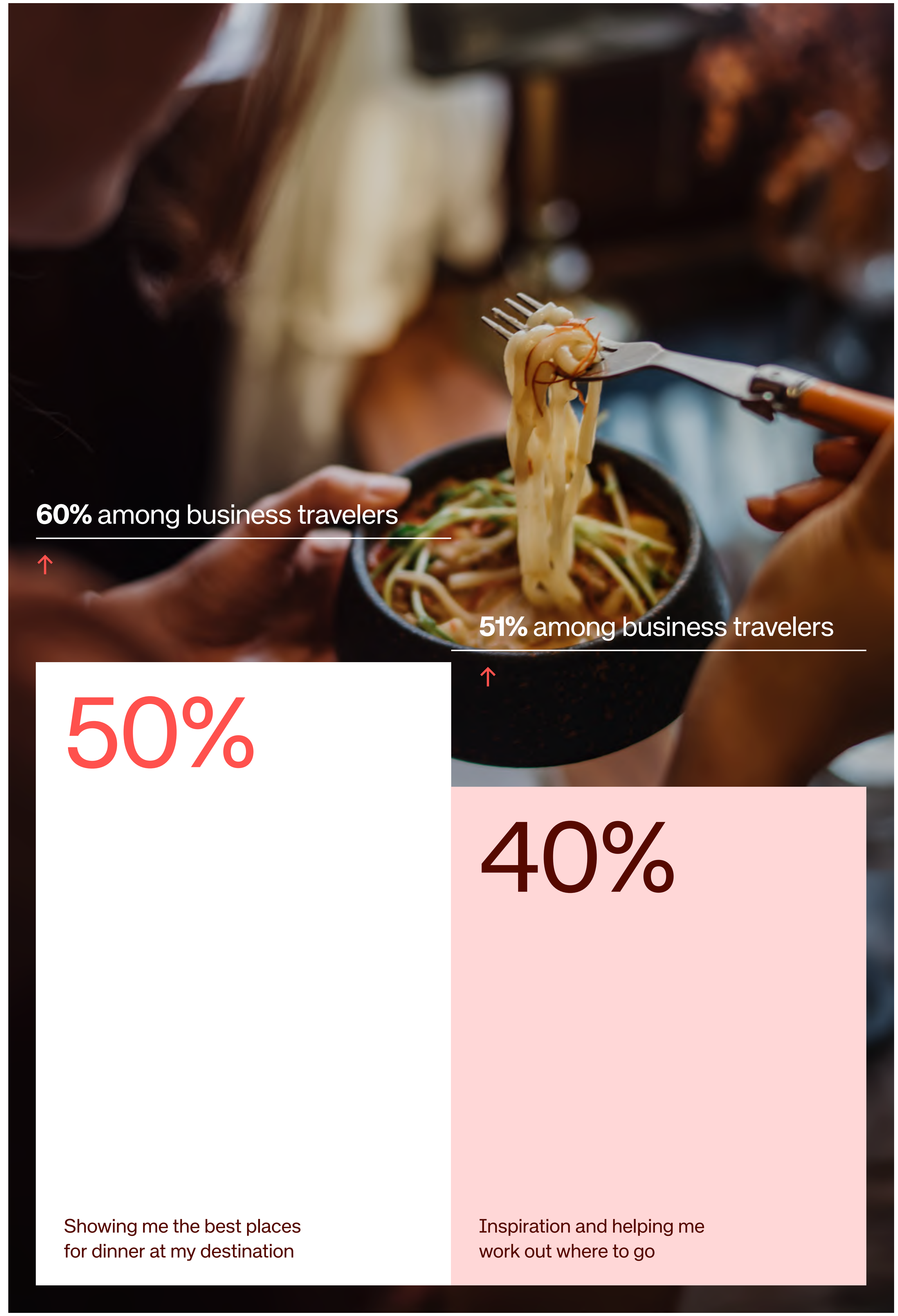
Business travelers

54% Making bookings for me

50% Discovering the best entertainment venues

18% Write a review of a dinner or hotel they experienced on their trip

Travel Dreams research finds, while fundamentals such as personal service remain vital, **the future of the hospitality industry is likely to focus more on technology and sustainability**.



Paperwork, unexpected charges and limited locations – car rental firms have pitfalls to avoid

Looking ahead to a future trip, travelers who hired cars revealed a series of annoyances which would make them consider switching provider next time around.

There was a degree of agreement between both business and leisure travelers when it came to the top four negative experiences, led by 'charges that get added to my bill that I was not aware of when I booked' (47%), 'lots of paperwork and lengthy check-out processes' (42%), 'inability to pick up and drop off at different locations' (37%) and 'receiving a car that is different to the one I chose online' (35%).

Dig a little deeper, however, and a trend toward sustainable options appears to be developing, especially in the business travel market. For example, a 'lack of sustainable or eco-friendly options' would be a reason to change provider for some (32%), while 'electric cars available, but no information about charging points' (also 32%) is important to others.

Car rental providers need to not only offer environmentally sustainable options, but ensure drivers have the information they need to maximize the opportunities on offer.

A reason to change provider →

Lack of sustainable or eco-friendly options	32%
Electric cars available, but no information about charging points	32%

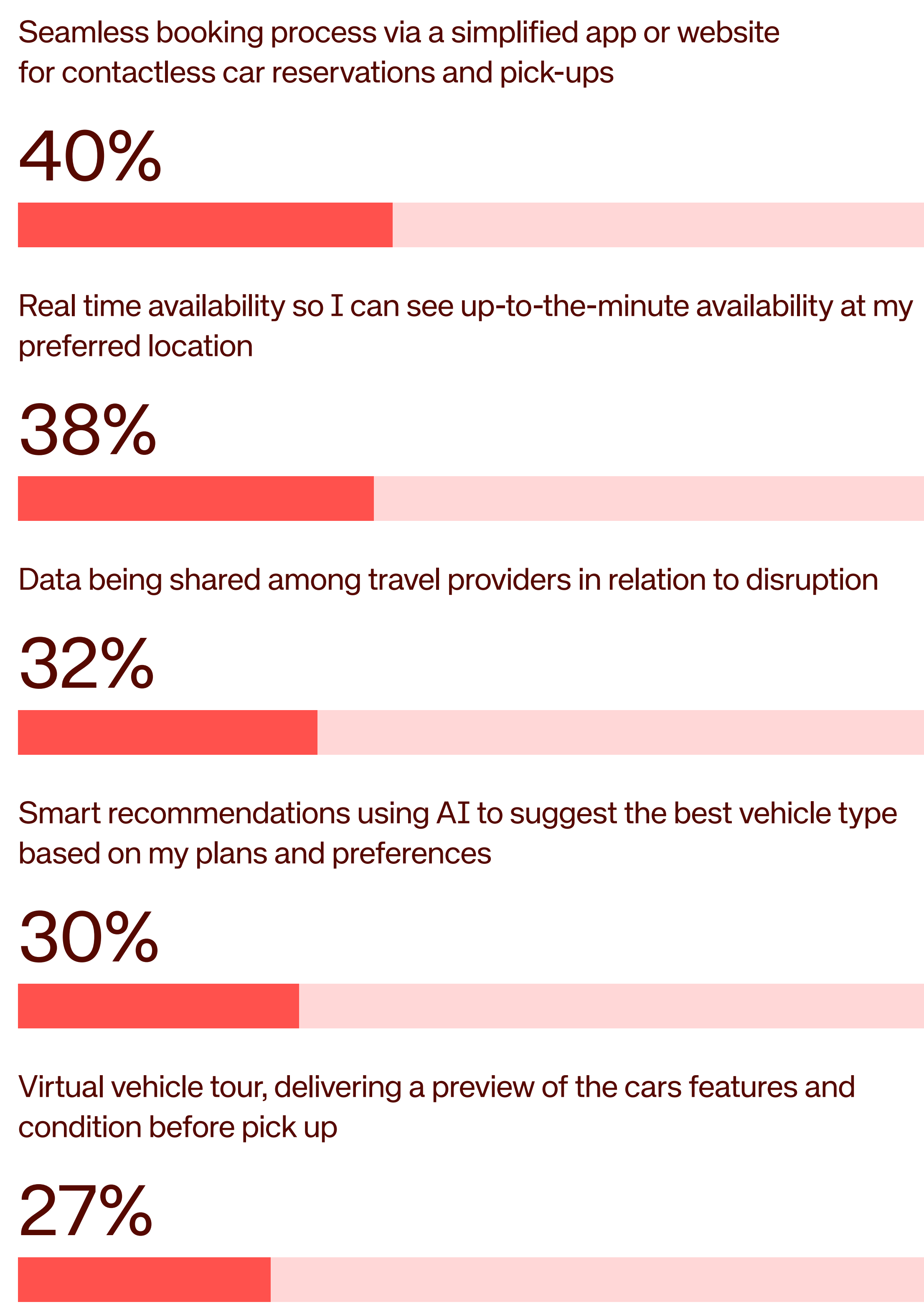
What factors or experiences would make a traveler consider switching to another car rental provider for the next trip abroad, if any?

	Business travelers	Leisure travelers
Charges that get added to my bill that I wasn't aware of when I booked	44%	49%
Lots of paperwork and lenghty checkout process	45%	41%
Inability to pick up and drop off at different locations	39%	35%
Receiving a car that's different to the one I chose online	37%	34%
Not having the car I want available	27%	27%
Electric cars available, but no information about charging points	35%	22%
Lack of sustainable or eco-friendly options	32%	20%

When it comes to building a better experience using technology, a ‘seamless booking process via a simplified app or website for contactless car reservations and pick-ups’ was the most sought innovation – called for by 40% of those surveyed. This was followed by ‘real time availability so I can see up-to-the-minute availability at my preferred location’ (38%).

‘Data being shared among travel providers in relation to disruption’ (32%) was next, illustrating the importance of collaboration across the travel ecosystem, with ‘smart recommendations using AI to suggest the best vehicle type based on my plans and preferences’ (30%) following.

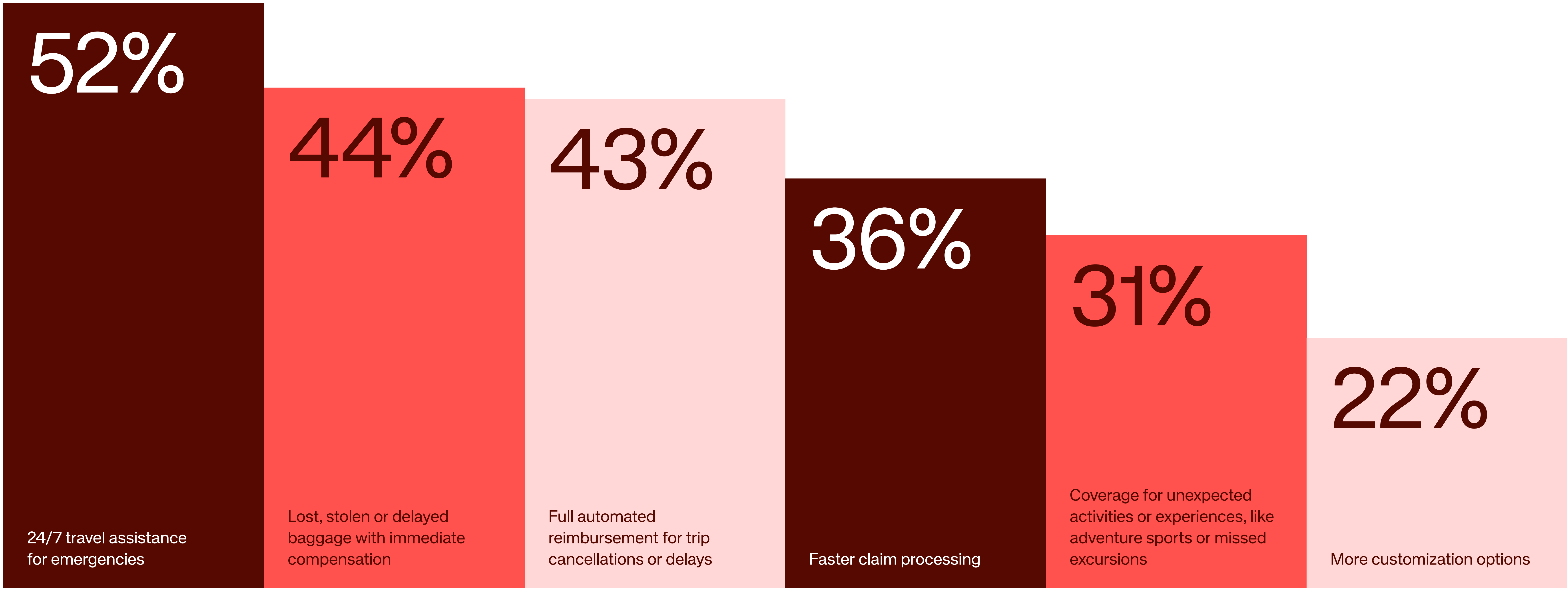
A ‘virtual vehicle tour, delivering a preview of the car’s features and condition before pick up’ (27%) rounded out the top five.



Speed and simplicity sought to improve insurance experience

Among those who book travel insurance, experiences could be improved by a renewed focus on proactive assistance, as well as simplicity and speed. The most sought-after development (52%) was enhanced ‘24/7 travel assistance for emergencies’ - travelers would like insurers to be there for them when things go wrong, rather than offering compensation later.

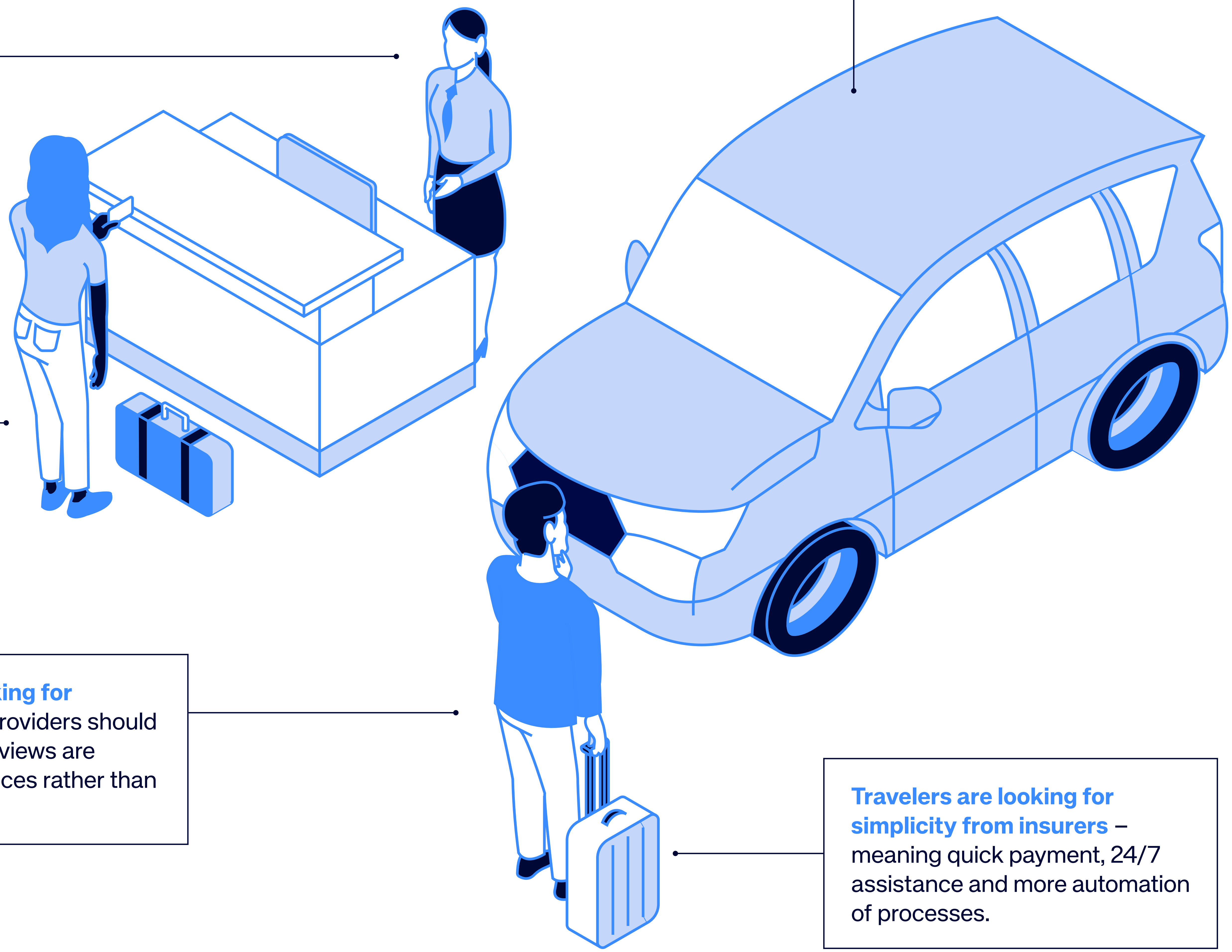
Moreover, calls for ‘lost, stolen or delayed baggage with immediate compensation’ (44%), ‘full automated reimbursement for trip cancellations or delays’ (43%) and ‘faster claim processing’ (36%) all suggest speed is of the essence.



Post-trip Reflections
Key Takeaways

Additional charges, paperwork and a lack of flexibility are the key reasons travelers would consider changing their car rental provider.

When thinking about the next trip, **travelers still prioritize value for money, excellent customer service and spotless rooms**.



Business travelers want additional flexibility – including a chance to get into the room early and the incorporation of new technology such as crypto payments and seamless online administration.

Travelers see the benefits of AI and are looking for assistance building future trips - but travel providers should think about incentivization to make sure the reviews are written by real people and reflect real experiences rather than chatbot engineered content.

Travelers are looking for simplicity from insurers – meaning quick payment, 24/7 assistance and more automation of processes.

Methodology

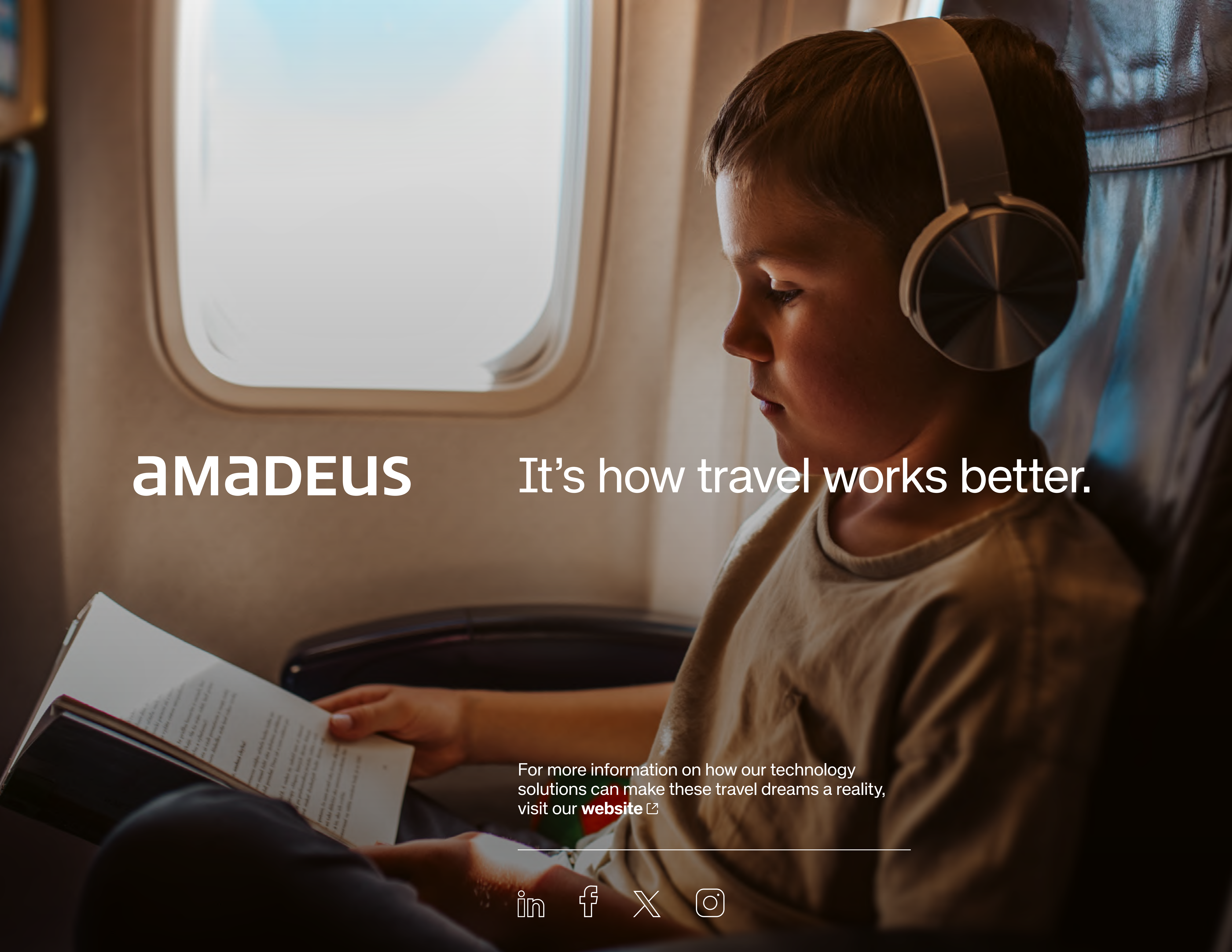
Amadeus commissioned strategic insight agency, **Opinium Research** to question 6,000 travelers in six key markets in the fourth quarter of 2024.

Each of the six markets - USA, China, Germany, UK, France and India - was identified by the World Travel & Tourism Council (**WTTC**) as a leader in driving tourism in 2024.

To deliver an industry perspective on the key topics covered in the report, interviews were conducted with executives from Amadeus, Flemings Hotels, Lexis Hotels, The Trans Hotel Group, Marcus Hotels, Geronimo Hospitality Group, Core Hospitality, Hegg Companies, ProColombia, Europcar, and AXA Partners.

*To calculate the potential revenue that could be added by selling hotel attributes, the following calculation was used, based on Amadeus Demand360® data:

- → Average hotel occupancy worldwide in 2024 stood at 69%, or 252 days
- → Average daily rate worldwide in 2024 stood at US$178, or $44,856 per annum
- → Therefore, if travelers are willing to spend 12% on top of ADR for attributes, this could equate to an additional US$5,383 per room, per year



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