Connected Journeys:

How will technology transform travel in the next decade?

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Contents

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Setting the scene

Foreword

Decius Valmorbida
President of Travel, Amadeus

Paco Pérez-Lozao Rüter
President, Hospitality, Amadeus

Travel is more than just a journey

If you think back to your last trip, whether for business or pleasure, it's easy to think of it as a single 'journey'. Getting from A to B.

But throughout one journey there is a series of micro-journeys with technology at the core. This is the job Amadeus has orchestrated for over three decades. Together with our partners and customers, we've come together as a global industry aiming to deliver the best experience for travelers with the least friction possible.

There's no denying that moving billions of people around the world is a complex business. Events (such as weather) and logistical or operational issues need to be planned for, mitigated and dealt with as if it is just another normal day. And when you consider how many millions of travelers have realized their travel aspirations without a hitch, you understand what an impressive job everyone in the travel and hospitality industries is doing day in, day out.

Just think about how far travel has come since the first commercial flight took off from St Petersburg, Florida, to make the 17-mile journey to Tampa, on New Year's Day in 1914. Today you can fly 9,000 miles non-stop from Perth to London. A similar transformation has occurred in airports. Terminal buildings that were once nothing more than drafty converted aircraft hangars, now have world-renowned architects competing to build them.

But that's not to say we've reached the pinnacle of success. The opportunities that emerging technologies offer the global travel and hospitality industries mean we are entering a new era of rapid transformation.

Delivering on hopes – and removing friction

Our research across seven markets has reminded us what travelers hope to achieve with their travel. Spending quality time with loved ones (27%) came top of the list. As useful as video calls are, nothing can replace the feeling of being together in person. As further evidence of what's been called the 'experience economy', many travelers are looking to create lasting memories (24%) and take a much-anticipated break from their daily routine (17%). Others hope to discover and immerse themselves in new and authentic cultures and experiences (20%) – again, something that only travel can deliver. People are also highly motivated to travel to improve their wellbeing (19%). When it comes to the actual journey, 22% of those surveyed said they hope for a smooth and frictionless travel experience.

Travel can deliver on all these hopes and aspirations, and it is the goal of every professional working in travel and hospitality to make each journey as stress-free as possible. For this report we also asked what makes travelers anxious about their journeys. Why? Because when we understand both the hopes and frustrations of travelers, we can work together to make better journeys.

What travelers hope to achieve because of their travel

27%

Spending quality time with loved ones

24%

Create lasting memories

17%

Take a much-anticipated break from their daily routine

20%

Hope to discover and immerse themselves in new and authentic cultures and experiences

19%

Travel to improve their wellbeing

22%

Hope for a smooth travel experience

Transforming the traveler experience

The challenges travelers and guests face today are not isolated, they span across the entire travel ecosystem. Addressing these pain points is not only a shared responsibility but a powerful opportunity to reshape how people experience travel. It begins with open, honest dialogue and a collective commitment to action. To truly unlock progress, the travel and hospitality industries must embrace an ecosystem mindset, one that breaks down silos and builds on openness, both in technology and in collaboration. Only then can we deliver the seamless, personalized experiences that travelers expect and deserve.

When it comes to the Hospitality industry, a profound transformation is also underway. Technology is being embraced as a strategic driver of growth, enhancing revenue, streamlining operations, and enabling the tailored experiences today's guests expect. Unsurprisingly, the essence of hospitality lies in human connection. So, to truly elevate service levels and enrich the guest journey, innovation must go hand in hand with the personal touches that define this industry.

Along with our customers and partners, Amadeus is fully committed to exploring how transformative thinking and technology can help deliver what travelers hope to achieve with the least friction possible. The tech space is rapidly evolving and so are travelers' and guests' expectations. That's why none of us can afford to stand still.

If you're already on a journey to transform your business - you're not alone. At Amadeus we're continually investing in cloud-native technology that transforms how travel works from biometrics to AI, through modern airline retailing to overhauling the hotel tech stack and everything in-between.

And if you're yet to start that transformation, we invite you to take a journey with us by exploring the insights from 9,500 travelers in seven strategic markets and industry experts representing leading global companies. You know the travel and hospitality industries as they operate today, but what could they transform into tomorrow? This report is designed to help you understand the art of the possible.

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What's in it for Travel and Hospitality?

A collective approach to innovation

Interoperability is essential here – not just in how the global travel and tourism industry connects, but in how it innovates and enhances the travel and hospitality sectors in terms of cutting-edge tools, services, and infrastructure. All boats need to rise with the tide when it comes to delivering on travelers' hopes and expectations.

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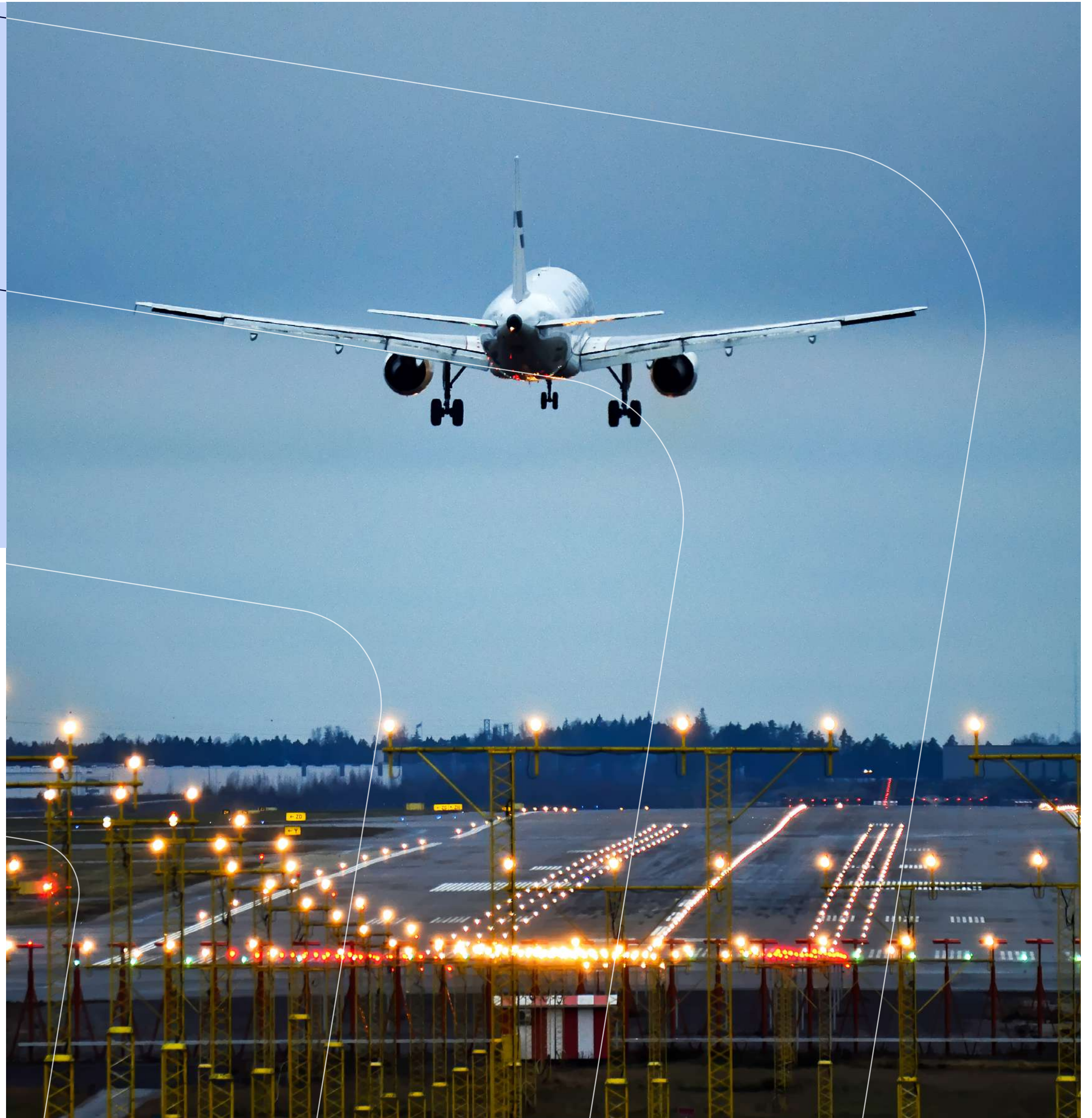
Three pillars for success

Travel and Hospitality can think about the customer through three key lenses. They influence each other and, importantly, lead to growth in revenues and customer satisfaction. Put simply, here are the **three key elements**:

① **Great experience - leading to increased loyalty**

② **Loyalty as a driver to reputation and retention**

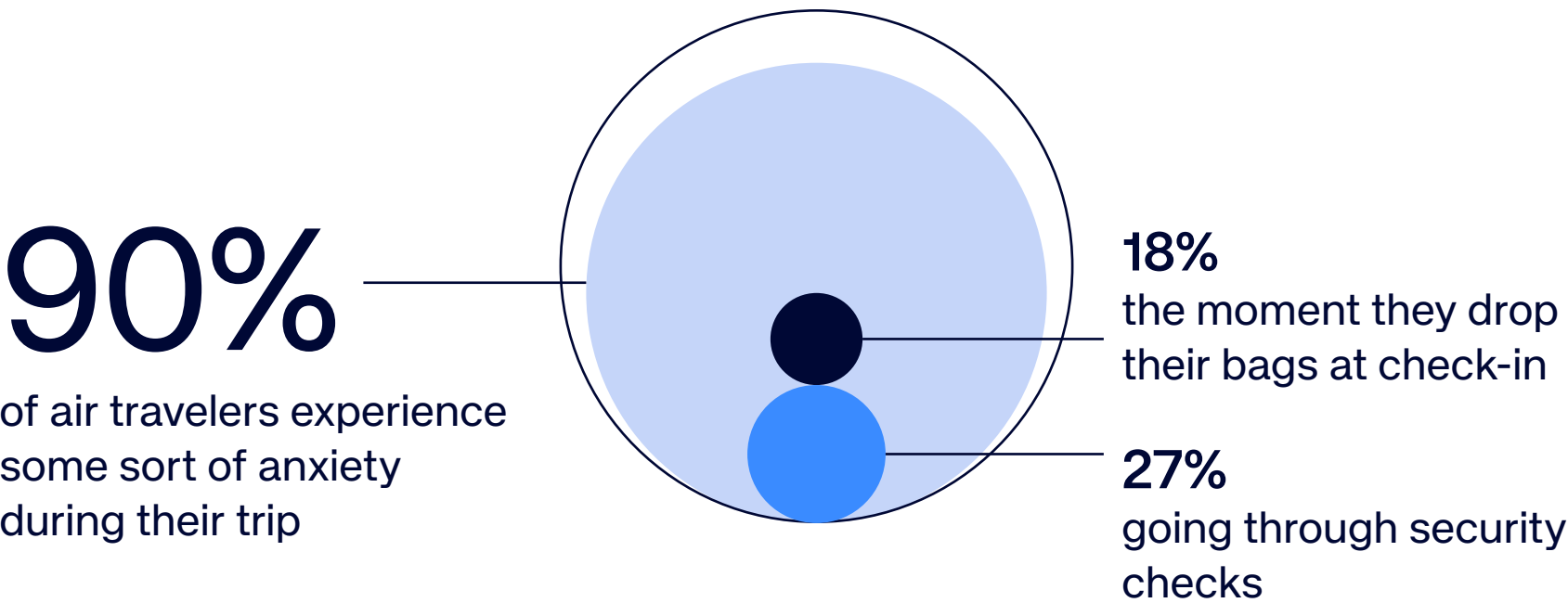③ **Revenue growth through customer retention and increased spending**

We'll look at how individual sectors and responsibilities throughout the overall journey need to consider the above in the second half of this report, but it's important to spend some time on the macro perspective first.

What makes a 'great' experience?

'Great' in this context means a good, positive and hope-fulfilling experience. In recently commissioned Amadeus data, we can see this first-hand.

The majority (90%) of air travelers experience some sort of anxiety during their trip; 18% call out the moment they drop their bags at check-in, and over a quarter (27%) pinpoint going through security checks as anxiety peaks. Technology has a clear role to play in alleviating these anxieties and making way for positive adventures.

The research suggests how small innovations can make a big difference. Live travel updates, digital wallets holding travel documents securely, and smart baggage tracking. These were a few cited by travelers from all over the world to reduce anxiety and deliver a better, smoother travel experience.

90%
of air travelers experience some sort of anxiety during their trip

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going through security checks

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The device-first approach

The ecommerce sector was also arguably a pioneer in moving to a mobile-first approach and to this day remains at the cutting edge of enhancing customer experience and driving loyalty (and revenue) as a result.

We're seeing this device-first thinking driving change throughout travel and hospitality. Some examples of this include digitizing the check-in, security, and boarding processes. A key area of growth however is based on learnings from ecommerce in terms of thinking of the mobile as the traveler's wallet. This will help unify the whole purchase and payments experience, not least in bringing the journey together for incentives and benefits.

The device used is also going to be critical when we consider the future of biometrics, identification and the growing popularity of wearable tech. There are already some pioneering proofs of concept being deployed which are looking at how such opportunities can be rolled out around remote security and the ability to move around an airport without encountering any points of human contact.

Many of the pioneering solutions in a device-first ecosystem rely on operations being handled in the cloud. This is increasingly becoming the transitional technology allowing the majority of the innovations we see to become reality. More on this later.

Looking for inspiration

Like any industry, focusing internally and relying on an echo chamber for insight into what drives customer experience can be stifling. There's value in looking farther afield at what other sectors are putting in place to drive customer retention and growth.

Ecommerce is a prime example here and there's plenty we can learn from the advances it has made in boosting customer loyalty through innovation. Central to the sector's success has been its omnichannel approach – something we can consider by proxy in terms of every stage of the journey being seamlessly integrated. 'Omnichannel' can be interpreted as 'unified' when we look at travel and hospitality.

Simplicity-driven loyalty

No-one wants friction or fragmentation during their holiday or when traveling for business. From a simple, swift check-in through to expedited car hire outside the airport, through to being able to get into your hotel room the minute you arrive – loyalty is fueled by a consistently smooth journey.

Loyalty in turn enables personalization. An increased number of repeat interactions allows companies to build ever-more refined portraits of their customers through gathering more data. This allows for personalized offers and benefits that further differentiate from the competition and drive return customers.

And the result of growing loyalty? Increasing retention is a more efficient and economically smart strategy than simply reducing churn and trying to attract replacement customers.

Individually, companies throughout the travel and hospitality sectors are working on the three key tenets of business success: acquisition,

retention, and loyalty. It can no longer be said that "acquiring" a customer equates to the simple act of doing business with them. You've only really won the customer when they come back for more.

But by working together we can better cross-sell as well as deliver seamless transitions throughout the journey. In doing so we increase the value of the travel and hospitality industries – value which can be invested in further innovation. This in turn will fuel better services, greater experiences and higher loyalty.

It's a virtuous circle of growth that is hard to establish and hard to maintain, but the rewards are huge.

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Part 1

Industry and Technology Overview

Defining Transformation

Understanding what transforming means

The dictionary definition of

'transformation'

→ as a noun is one which refers to completeness – a total change in appearance, predominantly aligned to improvement. But when we look at digital transformation we are rarely – if ever – talking about a finished process. Indeed, with change the only constant is technology, there are always new processes and solutions which can improve any operational need.

"As travelers' expectations of more intuitive, more personal, and more inspiring choices than were ever thought possible become the norm, travel and hospitality stakeholders must respond. A transforming travel industry needs transformative technology. Technology which benefits from an open mindset, one that embraces new ways of doing things. Technology that thrives on a partnership approach, working with others to make the impossible happen."

Daniel Batchelor

SVP Global Corporate Marketing and Communications, Amadeus

amaDEUS

Understanding the demand for transformation

To put this into context, we need to ask how the travel and hospitality industries are looking to transform. To understand this, we should look at three different stages of the process:

1. Firstly, how the *technology* is transforming

2. Secondly, how this is in turn, transforming operations

3. Thirdly and most importantly – how this is subsequently transforming the traveler experience

When we look at how the industry plans for transformation, we need to flip the infrastructure-up model and look experience-down. We must first ask ourselves, "what do we want to improve about the customer experience?" It's also important to understand what today's customer is demanding and expecting more of that we need to deliver. This then lends itself to understanding the operational change that needs to happen to fulfil that demand, before considering the technological solutions required to put such changes into effect. It's a bottom-up build to achieve a top-down understanding of the traveler's needs.

Once traveler needs are delivered through new technologies, these exact same solutions can swiftly become innate and embedded. Yet they must be *useful* and deliver on what's necessary, rather than what technology vendors want to implement without an understanding of the immediate problems it solves. We've seen this before...

"My message to everyone? Avoid getting swept up in the Hype Cycle of the latest technology trends. This doesn't mean you shouldn't understand, learn, and adopt new tools. It simply means you should remember that they are just tools. We need to be more deliberate about the interactions we want our people (customers, prospects, and employees alike) to experience, rather than just focusing on the capabilities we can provide. Ultimately, what problem are you trying to solve: giving them more tools, or addressing their issues with the right tools at the right time?"

John Morhous
Chief Experience Officer,
Flight Centre Travel Group

FLIGHT CENTRE
TRAVEL GROUP™

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Transformative technology

Well over a decade ago the Tumblr "Pictures of People Scanning QR Codes" ↗ was created with the simple, solitary message: "No posts yet." Its sardonic intent was to mock the hype around QR (Quick Response) codes which at the time were used sporadically (and in all truth, badly) by the advertising industry to drive traffic via a new click-through medium.

The tactic just hadn't become second nature among the public. And, while it was the pandemic which drove QR usage through monitoring the spread of the Covid-19 virus, the codes are now second nature. Today we use them for a plethora of use cases: to order food to our table, to get vouchers, to jump queues, to login to webpages.

Their ubiquitous nature and the high degree of success they have in doing what they're intended to, means they're now standardized and trusted. The public know what they're for and how to (easily) use them and have confidence they'll do what's needed. The 'Pictures of People Scanning QR Codes' Tumblr would need zettabytes of data to host relevant photos today.

Innovation catalysts

The point here is that technologies have inflection points and cycles that take many forms. It may simply come out of the blue – the launch of the iPhone with Steve Jobs' iconic black polo-neck being a prime example.

Transformative technologies can also come about through a series of planned transitional steps. Look at how mobile payments have grown over several years to the point where having your bank cards stored in your phone's wallet is the norm – contactless and PIN-free payments likewise. Yet when tap-to-pay first emerged it was with a GBP10 limit to avoid fraud in the UK, which slowly crept up with the improvement of payment security.

Chatbots likewise. Granted, few want to proactively talk to a chatbot for the want of nothing else to do, but if it's the choice of having a question answered quickly or holding on a customer support line for twenty minutes, the chatbot is usually the winner.

Transforming travel

The travel industry finds itself on a course made up of a series of transitions, which can be put down to a basic supply and demand model. Travelers need to be comfortable using biometrics at security, for example, for solutions to succeed, which in turn means the industry can start installing it wider.

But travel and hospitality demand continuity in the services provided to the traveler, so transformative steps are the only means to deploying innovation without compromise. It's not going to happen overnight.

Equally, transformation journeys are arguably never completed. They reach milestones and hit targets, but there's always improvements and enhancements which can be made based upon the cycles mentioned above.

The travel and hospitality industries exist to connect people – it's why travel happens. We have to ensure that technology doesn't compromise the need to give everyone the best experience.

"We are in a world where business continuity outweighs big bang disruption.

"So how do you transform? Progressively - and above all, by collaborating with partners and the broader ecosystem that shapes the passenger experience and the systems behind it."

Alexandre Sbragia

Senior Vice President of Engineering, Amadeus

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"Generative AI and autonomous agents are no longer abstract concepts; they are already being applied across travel and hospitality to personalize experiences, optimize operations, and reshape how value is created. The real reinvention comes when AI is applied to create simpler end-to-end journeys and stronger connections with travelers."

Emily Weiss

Senior Managing Director –
Global Industry Sector Lead, Travel,
Accenture

accenture

Drivers behind innovation

So, what are the key technologies driving change? Naturally, Artificial Intelligence (AI) and Generative AI (Gen AI) feature prominently, as does biometrics. But it's essential to note that these all fundamentally rely on the cloud.

This is an interesting situation. Cloud has long since enjoyed its moment at the peak of the hype cycle and is firmly in the plateau of productivity. But it's become the fundamental infrastructure for the technologies currently transforming how industries worldwide are booming.

Travel and hospitality are no different. If we look at the transformative technologies changing the landscape today, none of them would be possible purely with mainframes or without the ability to handle huge volumes of information (and at speed, with the utmost security).

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Clear-thinking disruption

When looking at how to innovate and transform, the travel and hospitality industries need to work together to understand how to deliver on the traveler's expectations – and how to do so collectively. We're stronger as an industry when we're working together.
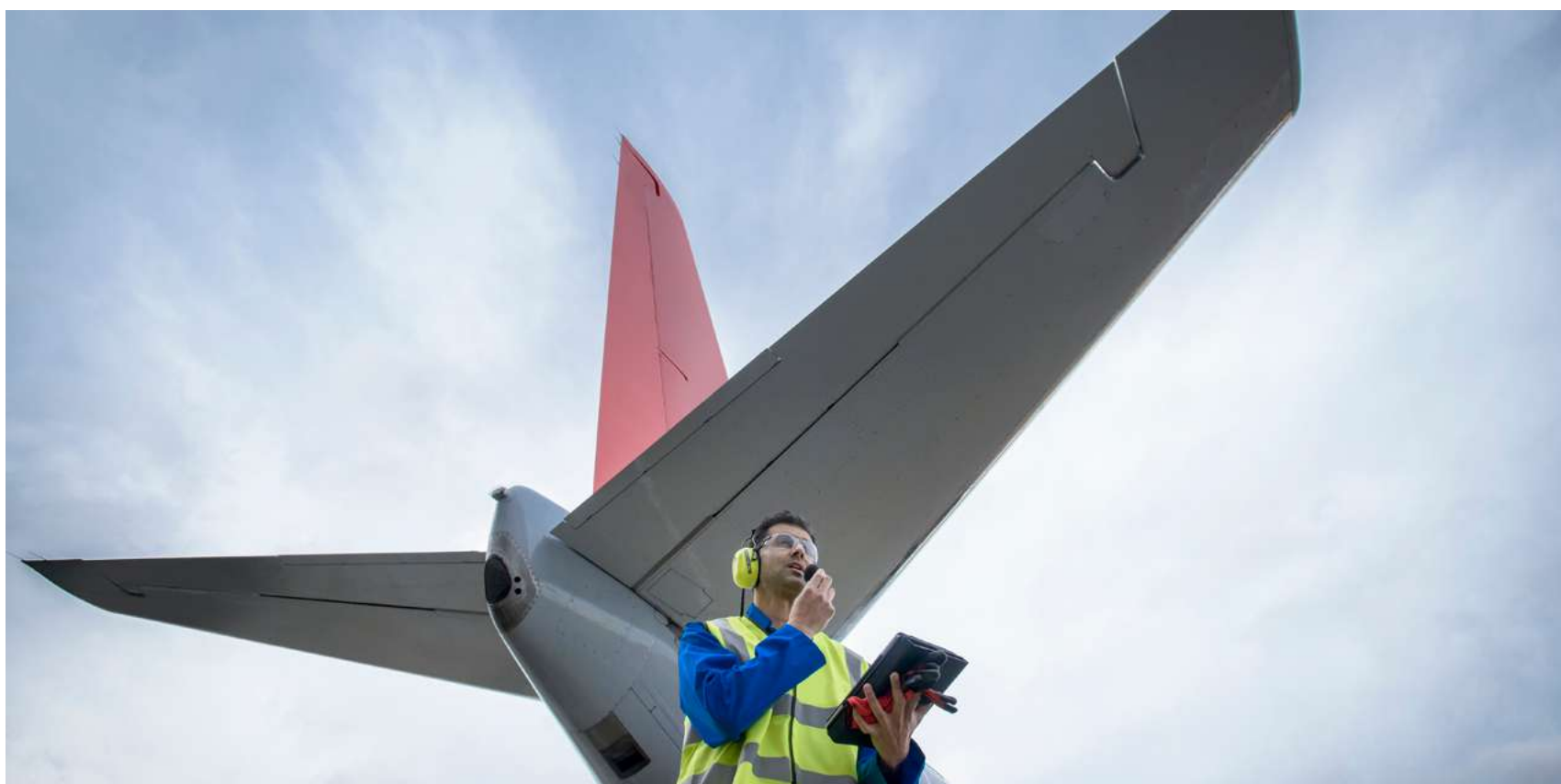
This collaborative approach also benefits testing – it can be trialed in one part of the ecosystem and if it works, rolled out farther. As such, it doesn't first need mass industry-wide agreement to deploy vast AI solutions. It needs one or two first movers to show the route for others to follow.

Ultimately, the global travel and hospitality industries can't stand still. Because at the end of the day the status quo isn't as effective as it could be, and traveler demands are getting increasingly tougher to satisfy. In such a scenario, those who have the solutions to deliver these expectations will reinforce their market leadership.

"At Amadeus, we recognize the extraordinary pace of change in our industry. That's why we're making deliberate, forward-looking investments in technology that deliver long-term value. We're not just focused on today's needs or off-the-shelf solutions—we're preparing for the innovations of tomorrow, including those we can't yet foresee. Being able to develop and use cloud-native solutions is a perfect example of this, and the impact is huge.

"You could put a 1980's Commodore 64 operating system onto the cloud, but that wouldn't get you any further. In an age of AI, we're developing software that's designed to benefit from and leverage native cloud services. This means it can not only utilize all of the AI capabilities available by default, but also extend beyond that into biometry, IOT devices and any other dimension. For our customers and partners, this means a massive increase in the value generated—by many orders of magnitude."

Gianni Pisanello

EVP, RevOps, Marketing and Strategy, Amadeus

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The need to constantly innovate and improve the customer experience has never been more true. The rapid advances in technology are changing not just *what's possible* but what travelers expect to be possible. It's also delivering on those sacrosanct aspects that travelers deem fundamental to any journey.

"Consider safety – it's a deeply personal part of the travel experience. It's also a complicated topic for many travelers, particularly women and/or individuals traveling alone. Safety comes loaded with different meanings, from physical and emotional safety to feeling safe in your own identity. It's also constantly changing, depending on past experiences, travel companions and destination.

"With such a variety of needs and perceptions, travelers can feel overwhelmed by safety considerations while travel providers may be unsure on how to offer meaningful reassurance that customers' safety is paramount – and technology can solve this conundrum.

"Although it's a complicated issue, advances in technology are enabling travel providers to give people not just the information they need to feel secure, but the ability to shape their own experience.

"With new technologies enabling this level of personalization at scale, the industry can respond to individual needs directly, ensuring travelers feel looked after in ways that go far beyond the standard safety checklist."

Beth Santos

Founder and CEO
Wanderful

WANDERFUL

Adapting to traveler expectations through AI

Consumer expectations around how they search, shop, and buy have fundamentally shifted over recent years, irrespective of the industry concerned. This extends not only to search and discovery but through the intrinsic influence that precedes them. Without wanting to generalize too much (there are always exceptions to the rule) digital natives, Gen Z and now Gen Alpha are naturally more predicated to using wider spheres (and platforms) of influence than their grandparents for whom adaptation is the key to adoption.

When we consider this through the lens of the travel and hospitality industries, we can see clearly how change is taking place. Our research discovered that YouTube or social media videos are the second most influential source of research – just behind word-of-mouth (36%). Interestingly, the YouTube effect stood at 26% in 2024, showing a near-40% uplift. Generative AI tools are rapidly growing in popularity thanks to their ease of use and comprehensive responses, which explains the near-doubling of usage – 18% now compared to 11% last year according to respondents in our survey for this report.

The most influential source of research in travel

36%

Word-of-mouth

26%

Youtube effect

18%

Generative AI tools
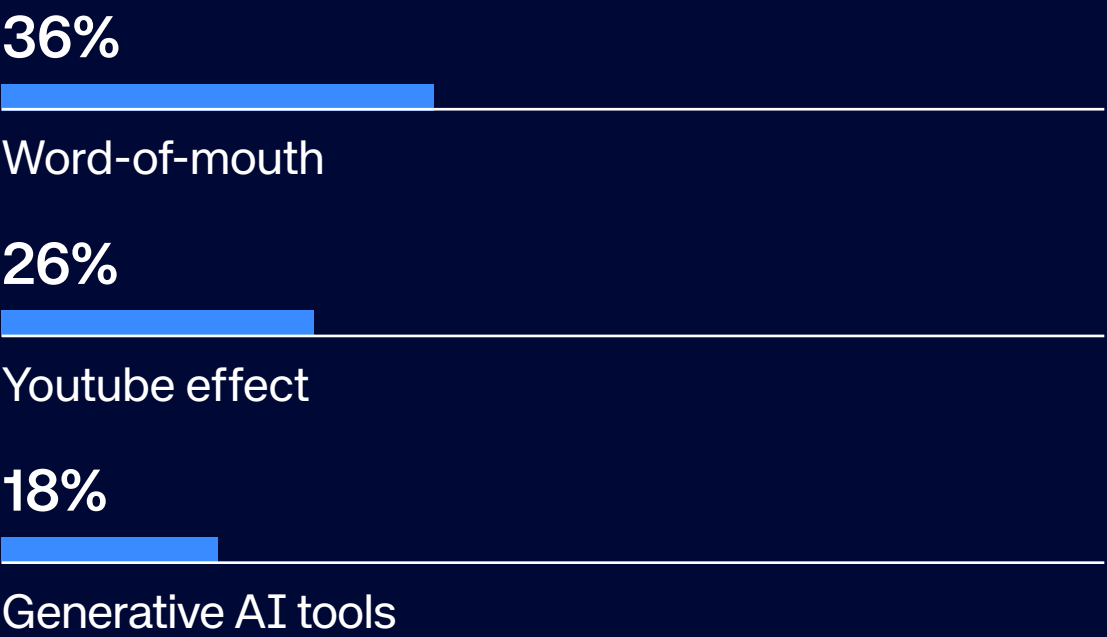
Microsoft-driven innovation

Amadeus continues its long-standing strategic partnership to innovate with Microsoft on AI-enhanced solutions driving operational efficiencies.

Amadeus' collaboration with Microsoft also enables the development of powerful solutions that directly impact the traveler experience. A series of key solutions have been developed as part of the collaboration:

"The travel industry is facing significant challenges, particularly in managing demand fluctuations and operational pressures. However, these challenges also present a clear opportunity to drive growth.

"Cloud, Agentic AI and other emerging technologies offer powerful tools to optimize asset utilization and enable more agile, data-driven decision-making. This allows organizations to streamline operations and deliver more tailored, seamless customer experiences.

"To succeed, it is essential to anticipate demand shifts, enhance resource management and foster collaboration across the ecosystem to create a more resilient, customer-centric environment. The industry's ability to adapt and innovate will be crucial for maintaining a competitive edge and delivering long-term value to customers and stakeholders."

Julie Shainock

Global Travel and Transport Industry leader
Microsoft

Microsoft

→ Cytric Easy for the corporate travel industry is an online booking and expense management tool embedded in Microsoft Teams. Engaging conversational experiences for travelers is delivered through enhanced Generative AI functionality.

→ Amadeus Virtual Airport Operations Centre enables airlines, airports, border control, and service providers to work together through fully digitalized airport operations centers.

→ The hospitality industry is embracing the opportunities brought to the table by Amadeus Advisor chat where Generative AI is simplifying a hotelier's ability to search and understand business intelligence data, with associate chatbot functionality allowing immediate access to data-driven insights.

Google powering adaption and adoption

Google, a partner of Amadeus, is at the forefront of transforming to accommodate consumers' expectations, particularly at the trip planning stage where research and exploration are most profound. This is despite (and perhaps because of) the breadth of resources and sources of information available, with Google data showing that 60% of travelers are undecided about their destination when they begin their research.
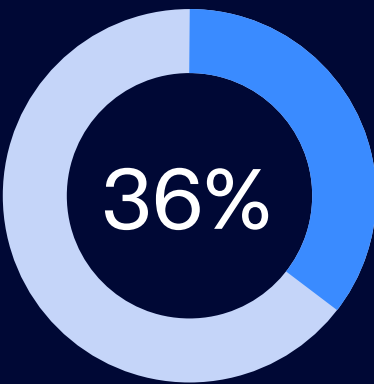
Amadeus' own research further reinforces the opportunity at hand for AI at the discovery stage of a journey with those using it to plan a trip citing the following as key benefits:
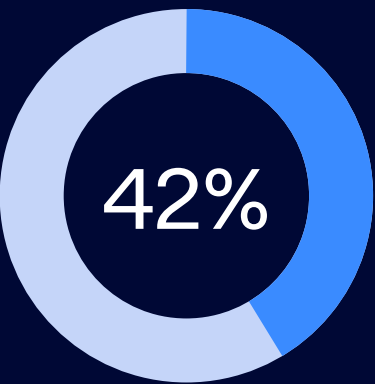
42%

Saving time planning

37%

Receiving highly personalized recommendations

36%
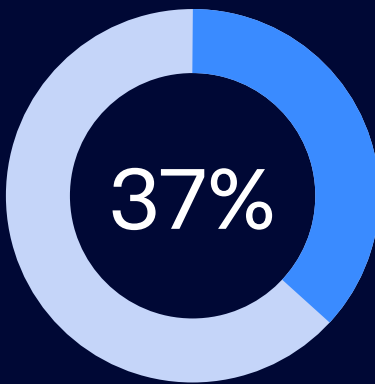
Finding new destinations

The culmination of the role of AI links directly to assurance, with 35% saying they felt more confident about the decisions they made about their trip.

"From getting inspiration, to creating plans with their travel companions and fitting a trip within their budget, the average person's planning phase takes over five hours. Looking ahead, this will only increase as Gen Zers and the more digitally native users increasingly use AI tools and AI Search to plan their trips."

Mark Bennett

Vice President, Knowledge & Information Partnerships EMEA, Google

Google

Cloud-based innovation

The cloud is the underpinning catalyst behind the role and roll-out of the game-changing AI and Gen AI solutions through the travel and hospitality sectors, and the leisure and corporate journeys these deliver.

Amadeus's multi-cloud provider strategy is a big part of this success. For example, Google Cloud's 42-region scale of operations is being leveraged to enhance the operational efficiency, resiliency, and scalability. A technical goal is to use Google Cloud's data analytics and management tools to harmonize data across several of Amadeus's customer systems, promoting agility and efficient data processing.

In order to keep pioneering new solutions, Amadeus will gain access to Google Cloud's AI stack, including the Vertex AI platform, and a vast selection of large language models (LLMs) available in the solution.

Ultimately, the use of AI is changing the face of the traveler experience – as is evident throughout this report. Crucially this is dependent on the shift to a cloud-native approach to innovation – something Amadeus is pioneering through its partnerships with Microsoft and Google Cloud.

"Travel is uniquely positioned to benefit from generative AI, which is changing what and how people search. We're excited to work with Amadeus to integrate AI across various stages of the travel journey and deliver greater value to partners."

Mark Bennett

Vice President, Knowledge & Information Partnerships EMEA, Google

Google

Knowing when to act

Grabbing the opportunity at hand

Advances in tech are happening at a pace and impact we truly have never seen before. Nowhere is this more evident than Artificial Intelligence (AI), as neatly summed up by John Chambers, ex-CEO at Cisco in a conversation with McKinsey in May 2025: "There's not been a technology since the internet with this broad of a scope and implementation. In many ways, the implementation of AI is like that of the internet but it's going to move at five times the speed, with three times the outcome."

"ChatGPT has established benchmarks at multiples of magnitude faster than any other technology – it hit 100m active users within two months of launch, while it took WhatsApp four years to do the same. The popularity of ChatGPT together with Gen AI apps like Claude, Perplexity, and others, means we can expect such tools to become a must-have on almost every phone in the very near future. We're seeing generational technology cycles happen at an unprecedented pace."

Suzanna Chiu

Head of Amadeus Ventures, Amadeus

amaDEUS

Standing still is simply not an option. 'Innovate fast' must be a driving principle. This needs to be done without compromising integrity with attention focused on solutions that solve genuine human needs.

"The travel industry stands at a juncture, where innovation is not merely an option but an imperative for sustained growth and competitiveness. But there are challenges that must be overcome. Industry stakeholders - including airlines, hotels, tour operators, and travel agencies - grapple with the immense burden of legacy systems, a highly fragmented operational landscape, and a complex patchwork of regulations.

"Consumer concerns revolve around privacy, the perceived complexity of new technologies, a fundamental lack of trust in novel offerings, and a desire for human interaction cannot be ignored."

Mark Bennett

Vice President, Knowledge & Information Partnerships EMEA, Google

Google

Understanding the human need

Importantly for the travel and hospitality sectors, these needs are (and always have been) consistent and identifiable because ultimately, travel – be it for leisure or for business reasons – is intrinsically linked with hope and aspirations.

Travelers' aspirations are linked to the purpose for travel being achieved. Hope the meeting secures the deal; hope they get to explore new places and unwind; hope the family has fun because time spent together can be a rarity. This echoes throughout the journey: hope you make your flight on time; hope you didn't overpack your suitcase; hope you got a great holiday deal.

With such high emotions inherently linked to travel, trust and reassurance is necessary throughout the trip. This is where technology transformation comes to the fore, and where innovation brings ever-increasingly more sophisticated solutions to market.

Adoption of new technologies, be it through the application of data; synchronicity across platforms; or through biometrics are all seeing successful implementation. But these aren't overnight processes.

When it comes to the journey, travelers may (technology early adopters aside), need reassurance about simplicity delivering the same uncompromising standards they are accustomed to (for example, around data and security).

Cloud-based reassurance

The tipping point ultimately lies in confidence that investments will bring a return. Until now, this has been a challenge with technology on **two main fronts**:

1 **Emerging technologies can bring unpredictability in modelling or a lack of external benchmarking upon which to base success**

2 **Lengthy build cycles can mean systems are obsolete by the time they are fully deployed**

However, these fundamental challenges with technological overhaul are now being directly addressed, with cloud technology the catalyst, where platforms provide ready-to-use infrastructure, development tools and services.

These platforms allow developers to design and iteratively test solutions without having to rely on hardware (and the bottlenecks in practicality and scale involved). Cloud platforms also bring unrivalled flexibility in capacity and collaboration.

This ultimately means a faster time to market and the ability to innovate faster (yet securely and confidently).

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Transformational thinking

Innovation must be more than an approach, it needs to be a mindset, with the ultimate ambition being to challenge the status quo.

Transformational and disruptive, risk-averse thinking isn't an overnight (or easy) shift. It demands trust in the reasons why new technologies are being considered, trialed and tested. There has to be confidence that new solutions necessitate exploration, and this is where we must look back at the 'benchmarking' aspect referenced above.

"The organizations that succeed in this AI-driven future will be those who understand that 'AI is only as good as your data' and take the necessary steps to build a solid data foundation.

"One of the biggest challenges facing organizations today is how to build and deploy high-quality AI agents that can reason on a company's own business data for more specific business outcomes. The second challenge is to ensure a modern operational database (OLTP) or a 'Lakebase' (essentially a super-fast database that works like an app's memory), is in place to ensure that these AI agents can be built with the speed, scale and governance required to be truly effective. We believe that solving these challenges is essential to achieving true digital transformation in the travel sector in 2025 and beyond."

Bryan Smith

Senior Industry Director, Databricks

databricks

"The biggest barriers are cultural and organizational, but also in risk management. Travelers today expect seamless experiences across every touchpoint where disruption is the exception, not the norm. We believe the future of travel is connected, intelligent, and resilient. ServiceNow brings the digital backbone that enables that future to scale – securely and efficiently."

Fabio Spoletini

GVP, Southern Europe, Middle East & Africa, ServiceNow

servicenow

Swifter visibility into ROI

The previous cost and length of deployment for technology overhaul projects carried risks when it came to the confidence that predicted ROI. Costs could spiral out of hand and timescales often ran across multiple years to then only solve yesterday's problems, not today's (let alone tomorrow's).

An upshot of this was a benchmarking lag. The ROI evidence took too long to come through, creating anxieties about the value of investment.

But the cloud approach addresses this, especially when it comes to the use of AI and Gen AI – two of the most lucrative and impact-driving technologies disrupting industries worldwide. The use of Gen AI is already widespread, with tangible evidence of its benefits. And nowhere is this more evident than customer services.

"We're seeing AI being deployed faster and at scale within back-office travel agency operations where tools are handling workloads that can be automated without the need for a human to do so. Far from taking jobs, this is freeing up agents to handle the right calls, faster and better.

"It halves the speed at which enquiries can be handled by automating the simplest and allocating the most difficult to in-person customer support teams, for example. In doing so, it doubles the number of enquiries being handled. This is a very clear demonstration of where ROI can be immediately witnessed."

Suzanna Chiu

Head of Amadeus Ventures, Amadeus

amadeus

So, where does this get us in understanding the time to act and undertake a transformation program? Well, we know the human needs we need to address and have the customer demand for it to be solved. We also have the technology and platforms upon which to iteratively innovate and we're already witnessing demonstrable returns on investment and evidence that solutions are making the difference they're intended for. As such, the time to act is very much "now".

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Managing Disruption

Different meanings to different audiences

The word 'disruption' has multiple interpretations – and each of them brings a nuanced difference to how it's perceived, understood, and responded to.

'Disruption'

→ is a word travelers don't want to hear. It brings mental images of lengthy queues at check-in or people sleeping at the airport as they wait for their flight to depart. Travelers see and experience delays or operational issues in ways heavily reliant on the media narrative (planes routinely leaving on time isn't a news story, after all).

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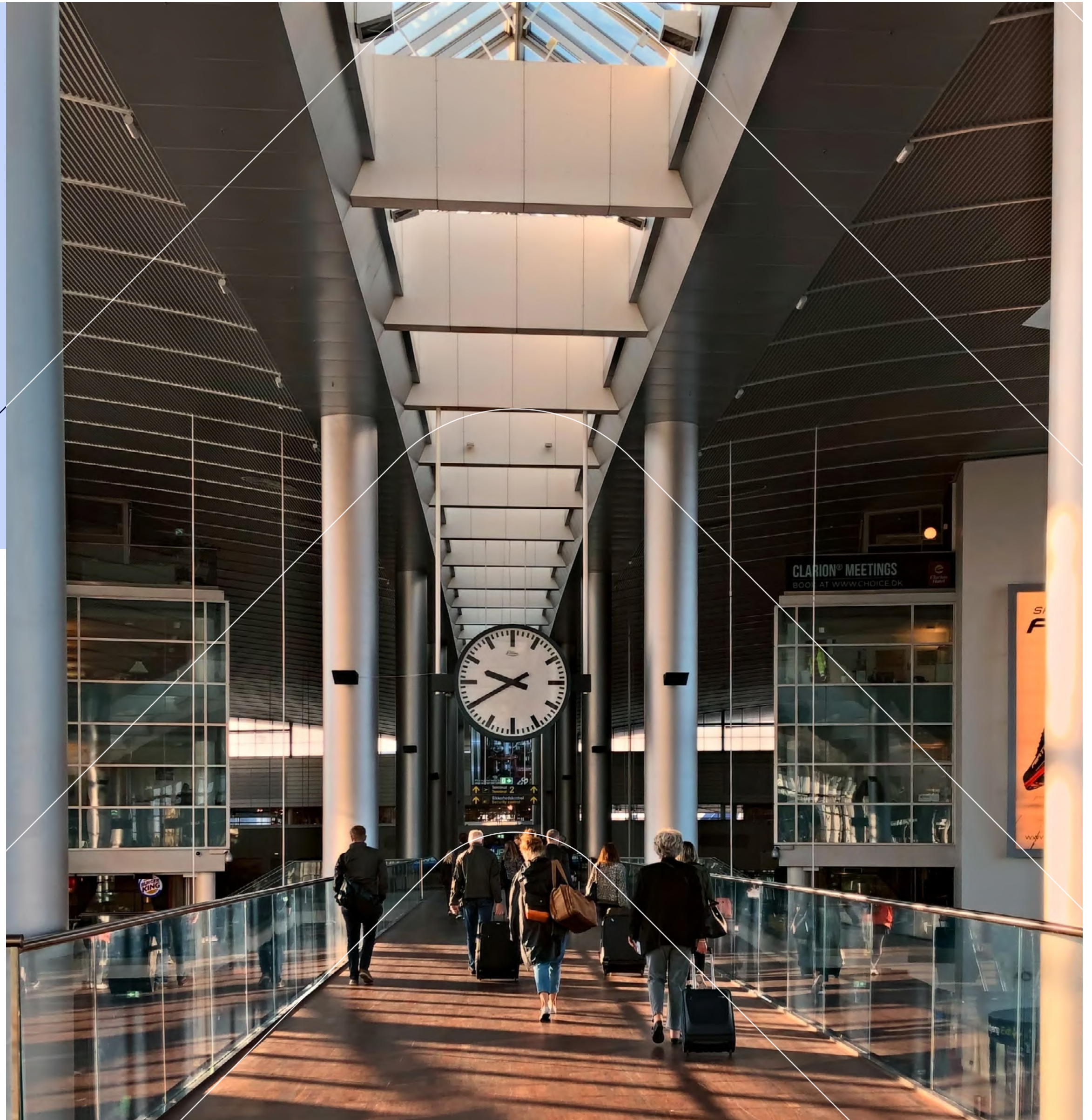
Issues of this kind come in many forms – and often outside the control of those in the travel industry. They might be environmental (such as a weather event); industrial (such as general strike action); incidental (such as a passenger falling ill); or it may be technical disruption in terms of faulty equipment.

However, we also need to factor in known, predictable disruption that can be planned for and acted upon to minimize impact. Here we might consider how transformation itself can bring a positive disruptive element as siloed systems, technologies and services are put to pasture and new tools are brought in to replace them. It's not simply plug-and-play.

Finally, we also need to consider the regulatory side of disruption. New compliance mandates will demand changes and upgrades in operations – with a greater or lesser degree of disruption at every step. When we consider the scale to which data underpins the entire travel ecosystem, the impact of new storage, privacy, security or collaboration regulations brings fresh challenges.

Let's look at these.

Reactive transformation

It's a fact of life that things go wrong – and with such a vast ecosystem as travel and hospitality there are naturally going to be more pressure points where problems occur. Moreover, you'd be hard pushed to find a global industry more at the mercy of the weather than travel and hospitality.

At the point of delivery or rather moment of truth, the traveler needs reassurance and confidence that the problem is being dealt with. They need to know that they're still getting to where they need to be (albeit later than planned).

It's in this instance that customer service becomes business (and reputationally) critical. Anxieties, emotions, and tensions are heightened – predominantly due to a combination of uncertainty of what's going on and pressure on the purpose of the trip happening in the right place at the right time.

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Having 'someone' to talk to

In times of distress, travelers need answers. Historically, these demands fell predominantly on either staff at the airport or those in a call center. But crowds swell around the former and lines are held on the latter.

The introduction of chatbots changed the game in this regard - initially solving straightforward decision-tree based questions, and now increasingly sophisticated solutions able to parse natural language. These are, to all intents and purposes to those using them, as good as the real thing. Again, provided the traveler has the right information and knows the situation, they're going to be calmer.

Amadeus is working with partners across the industry to pioneer new approaches to customer interaction and support. Importantly, where these solutions are automating enquiries and answering known responses, these are freeing up time for airport staff or customer support centers to speak with those who want a real person to talk to.

This need could be demographic (different generations will have different levels of trust and confidence in AI chatbots), or it could simply be a matter of preference and level of complexity.

Regardless, if most of the customer service enquiries are easily anticipated, frequently asked questions, then handling these with Agentic AI frees up customer service teams to handle more complex and in-person enquiries.

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Preparing for disruption

Ensuring that the right information and systems are in place (and at the touch of a button), is critical to guarantee that disruption is negated as much as is possible, irrespective of the cause.

This is another area where AI is coming to the fore. It's able to meticulously plan potential situations and prepare teams and individuals regarding their role should these arise.

Virtual Reality is already proving a success in this regard. It's allowing remote teams to diagnose in-the-field with the support of centralized experts. This means deploying solutions doesn't need to wait until the specialist is on-site.

Equally, fixing identified problems can be done remotely. Digital twins and virtual replicas of equipment and systems enable experts to visualize data, identify problems, and then subsequently guide on-site personnel through repairs.

Proactive disruption

Technological change doesn't happen overnight – especially when we look at the current tech-driven seismic shifts taking place. Transforming isn't a one step process, but instead an ongoing process of constant evolution as an organization strives to meet customer needs and leverage emerging technological solutions.

However, crucially when we look at how these changes are being made and prioritized, there's been a redistribution of power when it comes to technology in business.

In the last few years, the way businesses are treating IT has flipped on its head. Technology is now a strategic business consideration – it's no longer seen as a cost center, which was one of the first heads on the chopping block when it came to budget adjustments.

Technology is crucial to ensure any business (or industry) is able to transform and tackle today's problems.

With this perception shift has come an acceptance that to transform you need to disrupt. The challenge is doing so with the least impact possible.

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Transforming innovation with AI

The benefits of generative AI (Gen AI) are being seen internally within those companies pioneering the face of travel for the customer. Air France-KLM Group is one such company. It is using large language models (LLMs), to rapidly accelerate the time it takes to bring products to market.

> "You can very quickly develop a prototype and even technically scale it, and it's relatively simple for developers. The cost of development is not huge, so the time to market from a technology perspective is really fast."
>
> **Pierre-Olivier Bandet**
> CIO,
> Air France-KLM
>
> **AIRFRANCE KLM**

Through being able to road test solutions at pace, Gen AI can scenario plan and test feasibility sooner, better. It is also allowing its developer teams to scale prototypes at unprecedented speed – and in doing

so bringing the time-to-market down to a fraction of what it was previously.

The benefits of this are huge. It's reducing the cost of IT development teams in being able to use the same expertise, skills and knowledge faster than before – freeing up headspace to think about the prompts which will get the answers to the problems they're trying to solve.

Disruption for compliance

Few industries operate across as many borders, jurisdictions and regulatory frameworks as travel and hospitality. This makes compliance a uniquely tangled challenge.

The sector must constantly navigate a complex landscape of legal, financial and data obligations that make compliance far more than just a checkbox exercise. Every booking, boarding pass, and baggage claim adds yet another data point about the customer – one which also needs sharing with either the right authorities or simply the right operational partners to ensure travel is smooth and stress-free.

Keeping pace with the ever-changing legislative and regulatory landscape brings its own disruption as companies have to understand, for example, how to change processes or store data. But it's change nonetheless.

And in an industry built on trust, mobility and data, getting compliance wrong simply isn't an option.

A sustainable balance

In addition, beyond the governance side, we have to consider how the increasing use of Gen AI and Agentic AI is putting demands on energy and water supplies. In this regard the reporting side of compliance needs focus to ensure reported data is accurate, targets are reached, and operations aren't hit with significant penalties or fines.

This use of AI does, however, bring a conundrum to the table when it comes to reporting and sustainability. Yes, the increased use of Gen AI will consume orders of magnitude more energy than the systems it is replacing. But the processes it's taking over are, as a result, being rapidly sped up by significant orders of magnitude.

If you remove slow, laggard processes with fast, automated ones, then there's likely a net gain in productivity. Having the right technologies in place – and being able to efficiently upgrade them accordingly – can therefore reasonably be expected to create savings and drive down carbon impact.

Tackling silos

Ultimately, disruption can be sourced back to a lack of interconnectivity or silos – something which a cohesive infrastructure tackles head on.

This need for the common currency has to sit at the core of how technology is transforming the travel and hospitality industries. Consistency in platforms and infrastructure can address potential interoperability issues and in doing so create consistent, reliable, and ultimately expectation-meeting solutions for the traveler. The industry ignores this mandate at its peril.

"Disruption can often occur because something in the operational chain is not performing as expected. The reason why it propagates or snowballs is because then other functions are not well aware of what's happening and carry on as normal without responding to the imminent challenge.

"By aligning processes and sharing data – what we call working on a common currency – we can share collective decisions and head off disruption before it happens."

Pierre-Olivier Bandet
CIO,
Air France-KLM

AIRFRANCE KLM

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Part 2

The end-to-end journey

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Putting this into practice

Customer-centricity might not be a revolutionary mentality for public-facing industries, but it's one that is easier said than done. With so many individual systems and legacy technologies, the global travel and hospitality sectors demand seamless integration to make any trip, be it business or leisure, as enjoyable and stress free as possible.

This is an important consideration before we dive into each individual part of the traveler journey, from the act of booking through to hotel check-in. Because while we're looking at these as discrete parts of a trip, we can't think of them as siloed parts of the industry. An underlying infrastructure is key to creating a unified experience – an 'operating system' as it were, upon which travel happens. This is something Amadeus has decades of expertise and market leadership on and is paramount to transforming travel today.

The 'connected trip'

In establishing such unity, we push ahead toward the end goal of the AI-driven 'connected trip'. What we mean by this is the opportunity to become a proactive guide – a concierge as it were – who can predict and pre-empt what's next throughout a journey.

As an example, for a couple who may be heading away for a week in the sun, a system which can push suggestions for trending places to eat (and subsequently book a hard-to-get table for two) a fortnight before travel makes a very attractive proposition.

Equally, reminding travelers about booking a ride to the airport (and a transfer to the accommodation at the other end) will avoid panic the night before and most likely save money – something, from a business perspective, that procurement departments will certainly welcome!

Every element within this eases stress about what might or might not be forgotten and makes trips memorable and hassle-free.

Finnair is a pioneer in this regard. It's the first airline globally to create a full "Native Order" model with Amadeus, where all customer interactions and services will be unified under a single order record. This will allow for a seamless, personalized experience across all touchpoints.

"We are on a journey to become a true retailer. Our 'Native Order' approach will allow customers to have better control and understanding to manage all flight related services in a single digital record, simplifying the entire journey. However, retailing is also more than the 'Native Order'. It is about understanding the customer needs and managing the entire sales funnel from marketing to conversion to sales, as well as the end-to-end customer journey with data. In the future, our customers will be able to enjoy their own preferred way of travel."

Antti Kleemola

Chief Digital Officer, Finnair

FINNAIR

In making such an investment, operators can harness the personalization opportunity – something we know to be critical to travelers. **Our recent survey identified the opportunity in sharing the right offers** with the quarter (23%) of travelers who have a ritual of always grabbing a drink at the airport bar pre-flight, or the third (36%) who always like to eat at the same airport restaurant or cafe as part of their journey.

The data-first traveler

This 'connected trip' strategy relies upon the industry working together as an ecosystem to improve the entire journey, and in adopting a traveler-first approach to data analysis and prediction modelling.

This can only be possible through tackling siloed systems, products, or solutions and sharing data (without compromising regulations, security, or integrity). The whole process must be seamless from booking to baggage collection, through to transfer to the hotel and the traveler dumping their bags on the floor.

23%

of travelers who have a ritual of always grabbing a drink at the airport bar pre-flight

36%

who always like to eat at the same airport restaurant or cafe as part of their journey

"As we move into the era of data intelligence and AI agents, we are seeing an increased emphasis on automation to create more compelling, personalized experiences while boosting operational efficiency. This is driving a greater emphasis on data-driven collaboration between players in the industry, allowing these organizations to deliver more complete end-to-end experiences for their customers and coordinate activities for frictionless customer engagement between destinations."

Amar Kadamalakunte
Strategic Account Director, Databricks

databricks

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Addressing friction

In unifying elements of the trip – indeed, potentially the whole of it in due course – the travel and hospitality industries can tackle the key points of friction that are identified by travelers. Regardless of whether the concern is real or imagined, by understanding traveler pain points and worries, all players in the industry can work together to smooth the journey.
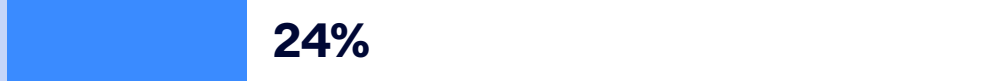
Our own data brings this to the fore starkly, with 90% of air travelers experiencing some sort of anxiety on their trip.
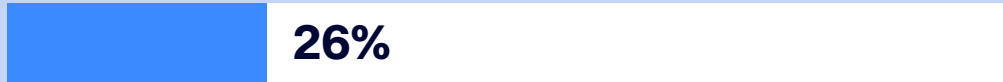
→
See breakdown
on the right

We asked travelers: Thinking about when you travel by plane abroad for a leisure trip, at which points of the journey, if ever, do you feel anxious?
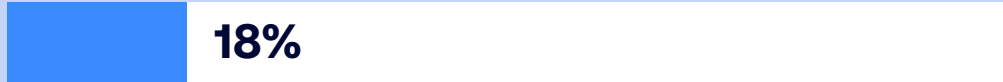
26%
Before I leave, while I'm packing my bags

24%
While I wait for my transport to the airport to arrive (i.e. cab, coach, train, etc.)

26%
While I travel to the airport

18%
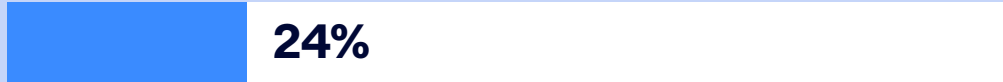When I drop my bags at the check-in

27%
During the security checks

15%
Past the security checks, while I wait for the gate information
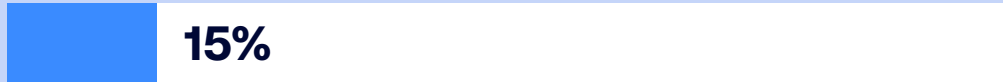
15%
While at the gate, waiting to board

24%
During the flight, including take-off and landing

15%
During passport and border checks
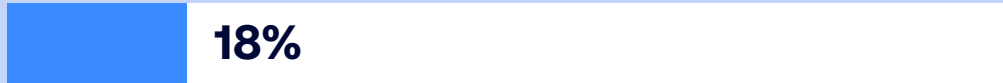
18%
While I wait for my checked-in luggage to arrive after landing

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The changing face of business travel

The ultimate ambition for bringing a more connected traveler journey is customer loyalty, be it the leisure or business traveler. The travel management sector for the latter is going to be a big beneficiary in this new era of connectivity, where client efficiency and becoming an extension of the procurement team is paramount.

A holistic approach to clients' travel needs means that more time can be spent by business travel consultants on adhering to company policies and maintaining a watch on potential breaches, which can quickly undermine a travel program and the benefits of negotiated rates. Equally, it can free up time for identification of efficiencies.

Such external support can elevate to the boardroom too. Using experience and deep sector expertise, travel management specialists can identify where sustainability targets can be improved to help align with corporate policies. This is in addition to the obvious opportunities for cost-saving at a micro level that collectively has a significant impact when laddered up to be considered at a macro level.

Device-centricity

At the core of the developments and progress toward 'the connected trip', we need to acknowledge how the Smartphone is the epicenter of how travel works today. According to Phocuswright ↗, it's projected to surpass the desktop as the main mode of travel bookings by 2026, with an estimated 46% of online travel bookings made on the mobile today. This growth is evident in the hospitality sector too where mobile has recently become the dominant channel (51%) for hotel bookings.

Speed and functionality are a key factor behind this growth, but the sheer convenience and always-there element of the mobile makes it a primary focus for the connected trip. Equally, the ability to push vouchers and special offers straight to the traveler's pocket makes the mobile essential.

It also acts as the information hub for a more unified journey and a consistent platform upon which to develop and establish interoperable solutions. Such a hub helps ensure quality and consistency of data, as well as the ultimate means to personalize experiences. It's a single source of truth.

This shift isn't straightforward of course – in another recent Amadeus survey, **57% of respondents said they'd rather print their boarding pass than rely on a mobile app**. So, while the device is front and center, not everyone wants everything stored on it: 'low battery anxiety' is a well-known phenomenon, and perhaps explains why having a paper trail, for example, provides reassurance.

Smartphone is the epicenter of how travel works today

46%
By 2026

Travel booking

51%
Today

Hotel booking
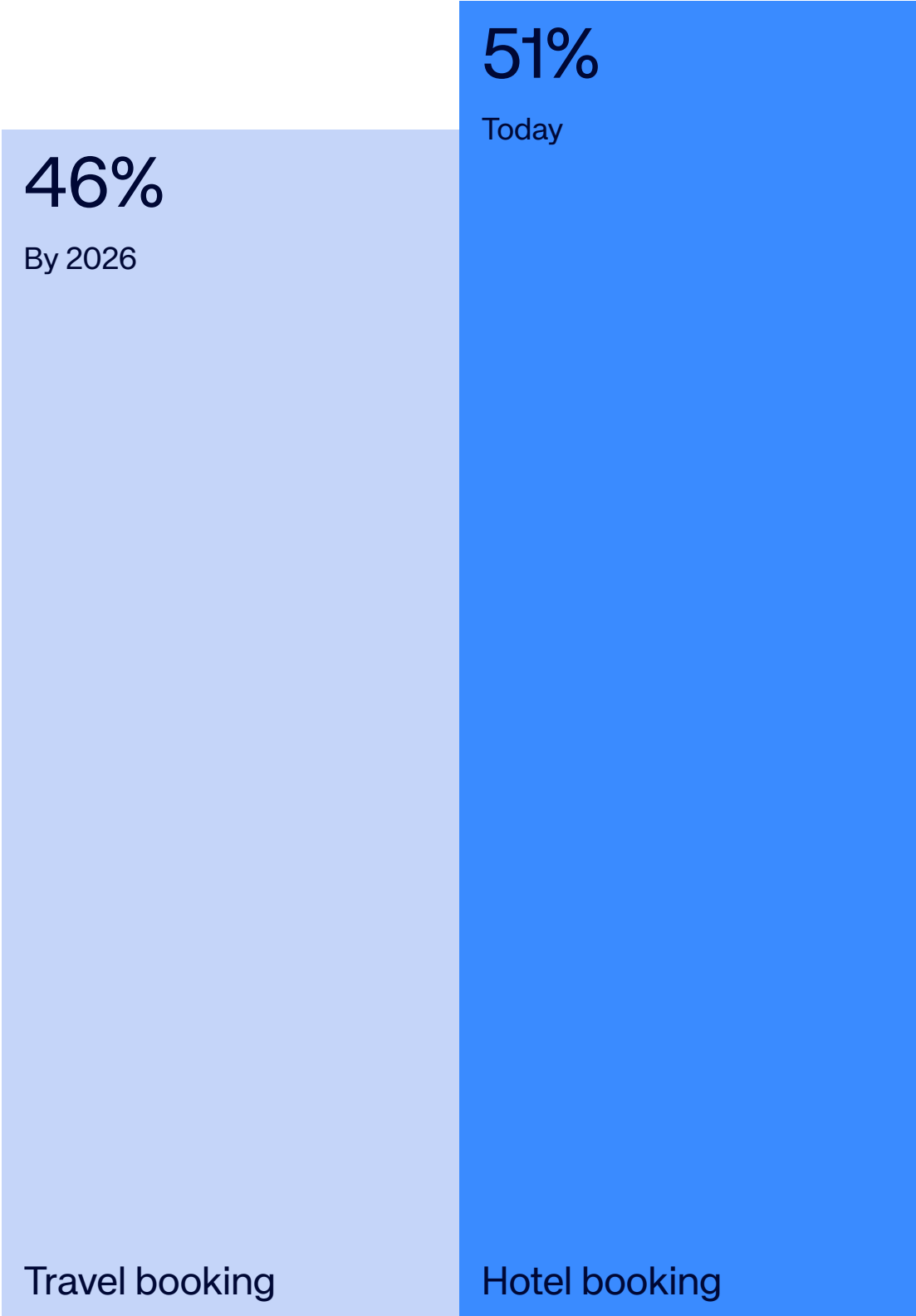
Customer-first

This is another indicator that when looking at transforming how travels works, we need to consider traveler sentiment. But this simply reinforces the need for connections. A single record of the customer will allow for such nuances and preferences to remain consistent throughout a journey. Knowledge of whether they're using mobile apps or not will ensure that notifications and updates are tailored accordingly.

The opportunity for the sector through this 'connected trip' solution is huge. We can't lose sight of the goal to make travel better for everyone. Each customer has their own expectations, and we must retain flexibility and agility throughout to satisfy these needs and remove friction at every stage. At the end of the day, travelers want to feel special and understood – the 'connected trip' is the industry's chance to do exactly that.

IATA'S 'One ID' ambition

Announced as a concept in 2017, IATA's 'One ID' global initiative aims to create a seamless, paperless, and contactless travel experience using biometrics at the center of identity verification.

It will allow travelers to move through airports from off-airport check-in to boarding with a single biometric token (mostly using facial recognition) stored on a device or in-app, as a secure digital key to the passenger's credentials. Once implemented it will do away with repeated showing of physical documentation which can cause delays and increase the risk of losing key entry authorization and identification papers. With consent controlled by the traveler, it provides the security required while giving passengers more control over their personal data, in a decentralized approach, starting from the comfort of their home.

One ID guidelines and recommendations support interoperability across airlines, airports, and border control agencies, aligning with global standards like ICAO's Digital Travel Credential.

Industry analysts estimate widespread adoption for 'One ID' across airports and airlines by the end of 2027, delivering frictionless, secure experiences for travelers, with the extended end-to-end model expected to see similar adoption timescales.

The booking experience

Making the booking experience less stressful

It could be argued that there's no more emotive stage of any trip than the booking experience. Regardless of whether it's for work or leisure, there are set criteria the traveler is searching for with the anticipation that the results offered match their hopes and ambitions.

For families, wallet constraints are more personal rather than policy based. They'll want the best experience possible for the kids while giving mum and dad some downtime in the evenings (a hotel with babysitter services is a must). The honeymooning couple will need somewhere that makes the ultimate memory (and great Instagram content).

Transforming to deliver on traveler aspirations

But with such ambitions and hopes come the apprehensions that they might not be realistic or that insurmountable barriers stand in the way. This is especially true when it comes to budget and logistics – indeed, research from Amadeus identified these as the two highest anxieties at 29% and 28% respectively.

While the travel and hospitality industries can't promise to fulfil every demand and ambition, they have to ensure that every relevant and exciting option is made visible. This is where transforming how travel works through technology comes into its own. It's a mindset that has driven the industry on for decades and continually delivers amazing experiences for millions of travelers. But it's not easy.

Apprehensions that ambitions and hopes might not be realistic or that insurmountable barriers stand in the way

29%

28%

Budget

Logistics
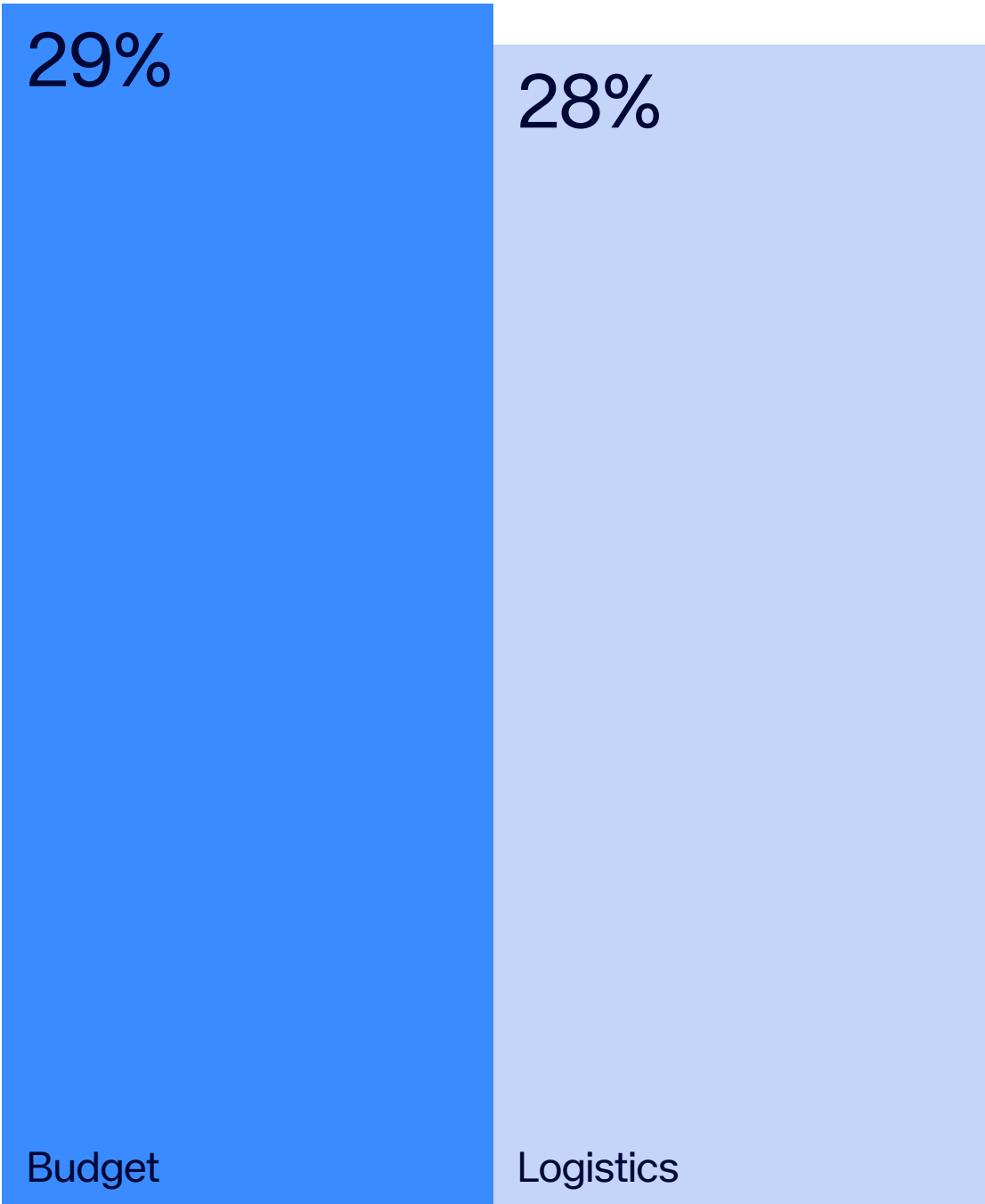
"The pace of change in the travel industry is daunting, to be sure. For example, between now and 2030, many aspects of travel retail and channel distribution will evolve substantially. Travel providers will adopt new technology platforms and new ways of working, and customers will react with new demands, and higher expectations.

"But none of this is new. The travel industry has endured changes of this magnitude at least twice in the past 30 years."
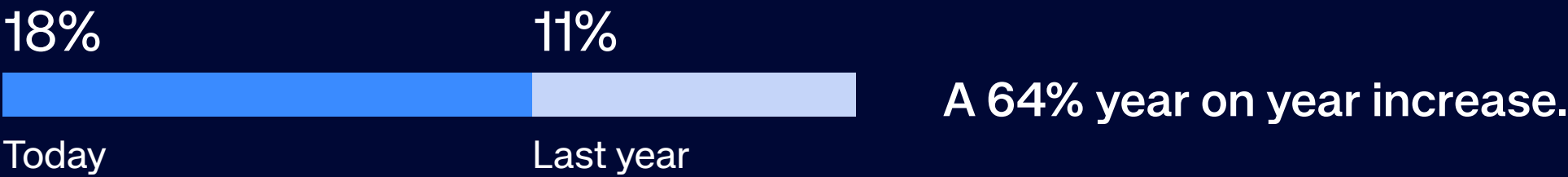
Dr. Dee K. Waddell

Global Head of Consumer, Travel & Transportation Industries, IBM
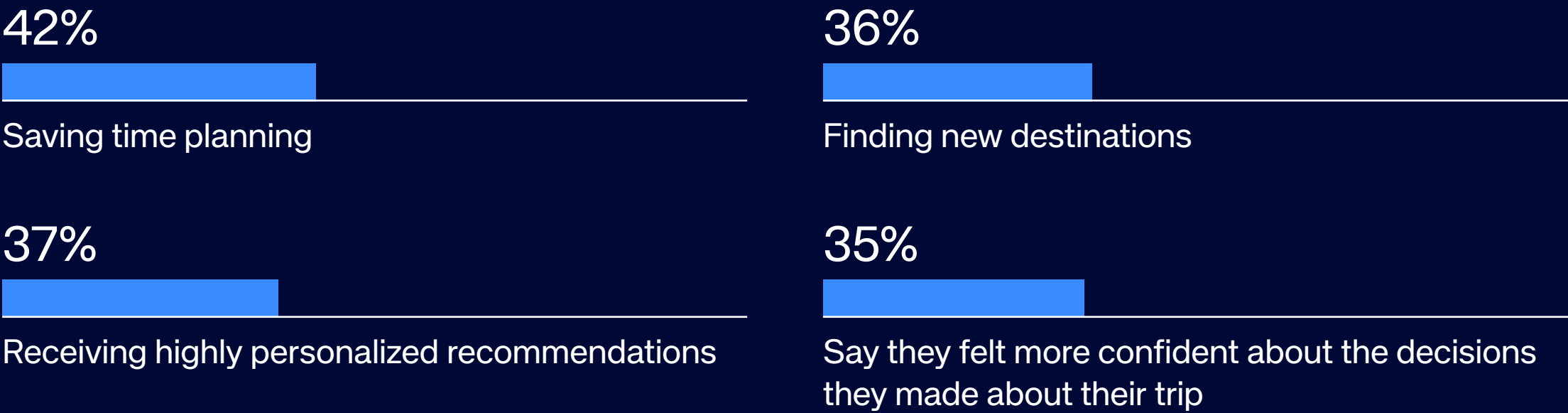
IBM

Traveler-first Generative AI

This theme of constant evolution and adaptation to traveler demand and expectation is central to the transformation journey the industry is currently on. You only need to look at the rapid advances in generative AI (Gen AI) to see how the landscape is changing – both externally in terms of how it's improving the whole booking experience, as well as internally within the industry to identify trends and emerging habits in customer demand.

Taking this first point, the traveler booking experience has perhaps never been better balanced. Gen AI-powered chatbots can answer basic, structured (and, increasingly, unstructured) inquiries from customers in real-time. This is freeing up human customer service operatives to handle those calls and queries which demand more analysis, are more complex, or which involve regulatory or compliance needs. Equally, they're able to act as the in-person support that many travelers want; not everyone wants to speak to an AI-generated chatbot, for example.

The use of Generative AI tools for travel research has risen by a significant factor over the last twelve months:

18%   **11%**

Today   Last year   **A 64% year on year increase.**

Of those who use AI to plan a trip, key benefits cited include:

42%

Saving time planning

36%

Finding new destinations

37%

Receiving highly personalized recommendations

35%

Say they felt more confident about the decisions they made about their trip

On the other hand, some encountered negative experiences.

25%

Say they received outdated or inaccurate information.

25%

say they had trouble getting AI to understand their specific preferences

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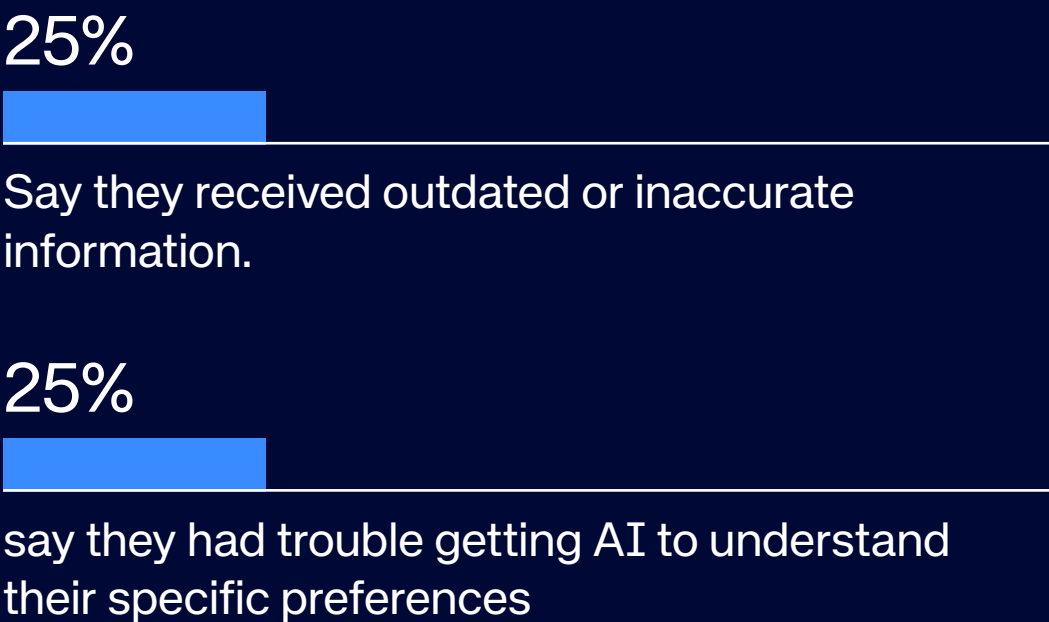
"Travelers are as diverse in their anxieties as they are in their expectations. While some customer segments are pushing travel companies to innovate by embracing new applications and ways of engaging, others are intent on maintaining their established patterns of interaction."

This is a key point to remember throughout any strategic transformation program – the industry is here to serve one person: the traveler.

"Travel companies must learn to innovate in ways that serve the needs of all customer communities because standing still is never a viable option in a domain as dynamic as the travel industry."

Steve Peterson

Travel & Transportation Global Industry Lead, IBM
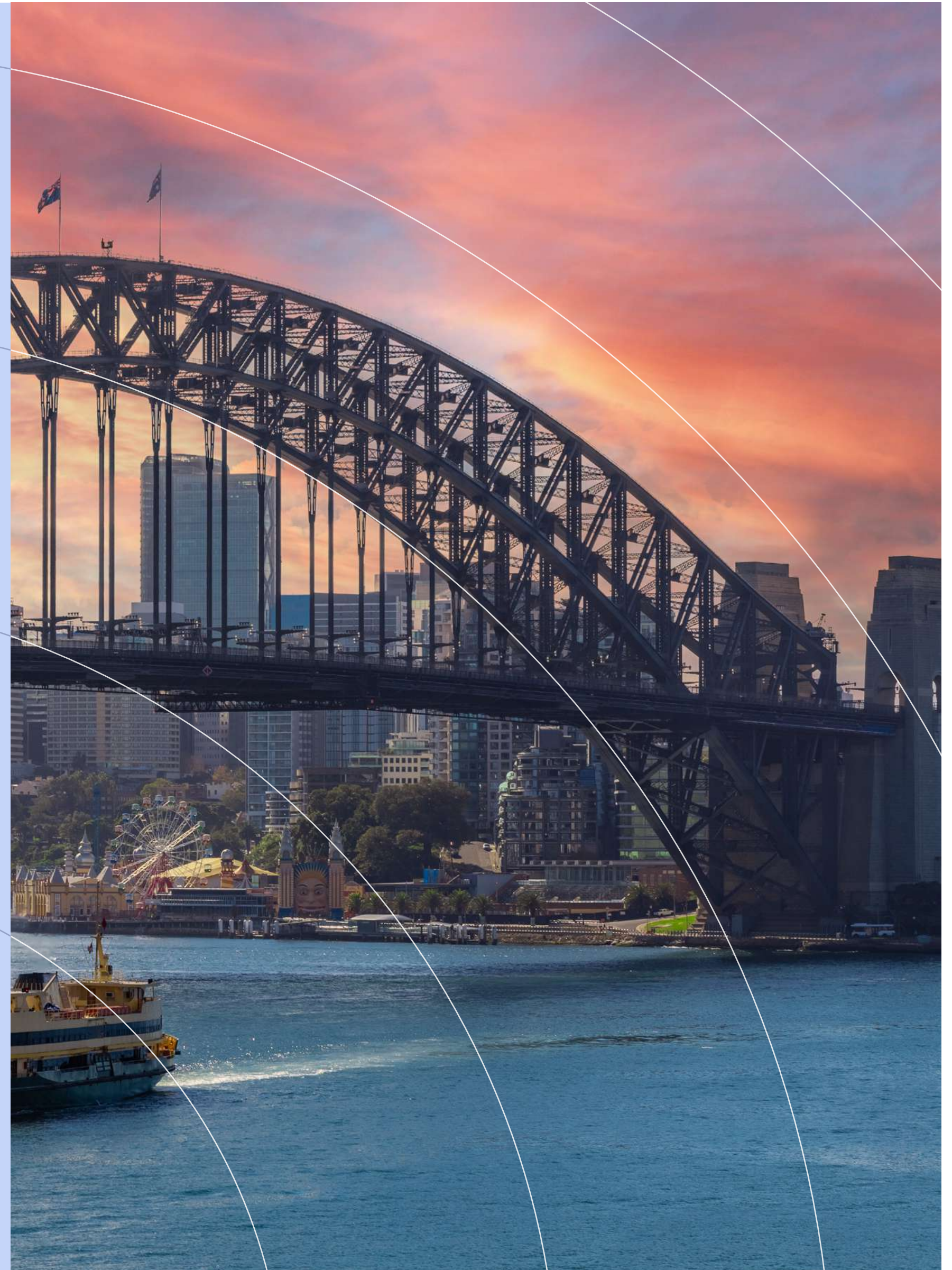
Data-driven strategic insight

The insights taken from the millions of bookings made by the industry each year are also being used to great effect. Through understanding trends and behaviors in booking, travel operators and the hospitality industry can develop new propositions and enhance those already on offer.

Nowhere is this better demonstrated than with the rise in entertainment-related tourism. As an example, when the announcement of a worldwide tour from Taylor Swift was made, Agoda saw search traffic for the destinations involved increase by a staggering 500%.

"The global success of 'White Lotus' – a HBO TV show based on the exploits of guests and staff within a luxury hotel saw travel enquiries surge season-upon-season. To piggyback on the success, we've seen hotels host 'White Lotus' themed experiences such as weekend afternoon tea and bar pop-ups bringing the show experience to life.

"Our investment in technology is allowing our partners to take advantage of the opportunities from this growth in 'live tourism', but it's also highlighting macro cultural travel trends."

Andrew Smith
Senior Vice President,
Agoda

agoda
●●●●●

Macro trend insight

These are of course global cultural examples, but sharing more specific data pays dividends across the board.

It's in this regard that the booking information supplied by B2C platforms such as Agoda can share market intelligence throughout the travel and hospitality sectors and allow everyone to adapt and ultimately benefit from it.

A virtuous circle

The advances in Gen AI for everything from booking and fine-tuning results to directing inquiries to the right operator (be it human or AI) is bringing unprecedented amounts of data back into the industry. This data delivers previously unimaginably granular insight into traveler demand and expectation.

The smartest companies in the travel and hospitality industries will turn this to their (and the travelers') advantage and use the findings to improve their own offerings and solutions. Iterative improvements naturally follow, reflecting the needs and demands of every journey.

This cycle, one fueled by transforming how travel works through technology, means the industry as a whole is able to fulfill its promise to deliver on the hopes and expectations of every traveler. It's an opportunity that can't be ignored.

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The corporate travel booking experience

Priorities in business travel

It's not just the leisure traveler who needs to be considered when looking at the booking landscape, the business traveler also has their own aspirations and pain points when it comes to their travel and booking needs. Understandably, flight delays or cancellations based on circumstances outside of their control are the number one source of anxiety, followed by a fear that misplaced baggage might affect their professional appearance according to Amadeus research commissioned for this report.

This same research conducted in June 2025 demonstrates clearly that technology is crucial for easing the concerns of business travelers. Top solutions include 24/7 in app customer support (30%) followed by a digital wallet with access to travel documents (29%), and one app that combines all travel information (flight, hotels, insurance, etc.) (28%).

Technology is crucial for easing the concerns of business travelers. Top solutions include:

30% — 24/7 in app customer support

29% — Digital wallet with access to travel documents

28% — One app that combines all travel information (flight, hotels, insurance etc)
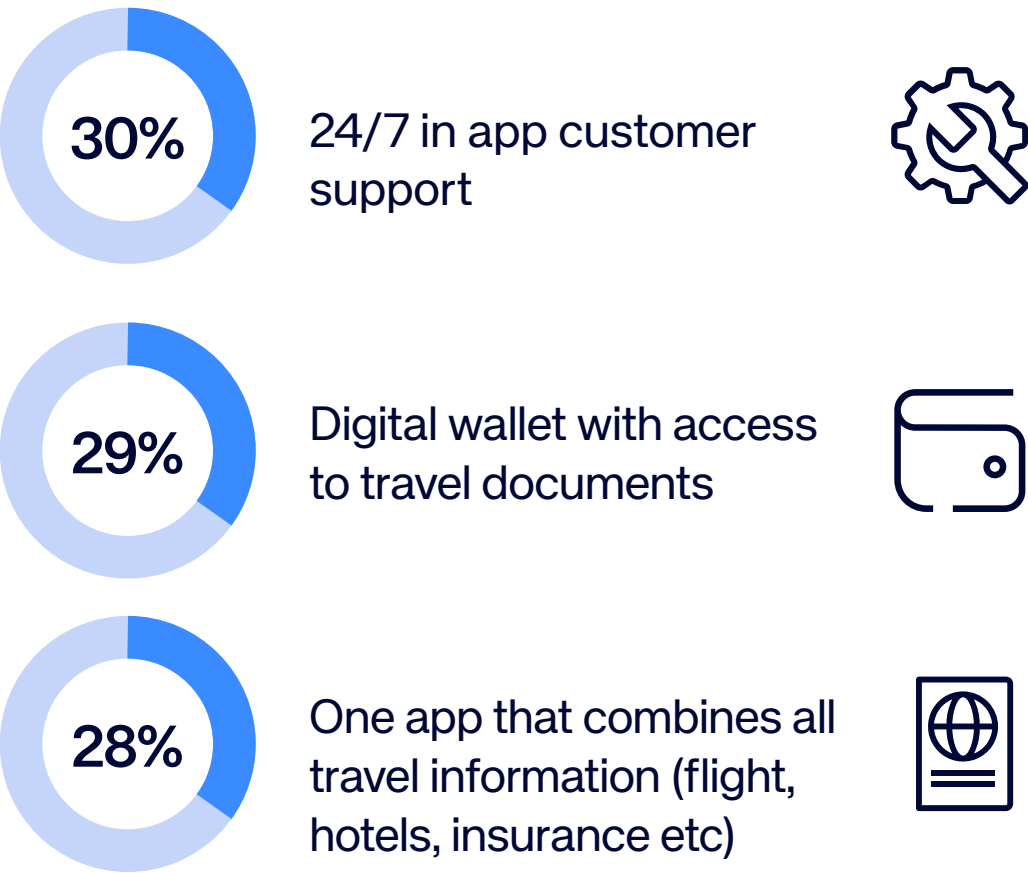
Any discussion on corporate travel must include the buyer, which typically includes input from the procurement and finance teams. Successful managed travel programs ensure that travelers have the confidence they can reach business meetings comfortably and on time, all while remaining compliant with their company's travel policies.

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The changing role of the travel consultant

The transformation in technology solutions is creating a fundamental shift in the role of corporate travel consultants. Previously, this group primarily looked at booking the travel, focusing on the itinerary. Now, the role has evolved into managing travel, often as a natural extension of internal procurement functions, while supporting the financial department through reducing costs and increasing efficiencies.

This comes from 'did you know?' insights as Steve Banks, CEO, Travel Division for The Human Network

(parent company of Beyond Business Travel) calls it: "Analyzing corporate travel data can reveal previously hidden trends and behaviors of those booking their own travel. It's not uncommon to find individuals wanting to book their own flights to increase their loyalty points, for example, which could compromise policies," he added. Amadeus research reveals that business travelers tend to subscribe to more loyalty programs than leisure-only travelers. 41% of business travelers participate in a hotel loyalty program for instance, compared to 31% of leisure travelers.

Relevant information is also helpful in reducing costs. Understanding who might be booking flights late (and therefore at a potential premium), can allow teams client-side to speak to individuals to plan their itineraries farther in advance and make savings.

41%

of business travelers have a hotel loyalty programme

31%

of leisure only travelers have a hotel loyalty programme

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From policy to regulation

The role of travel management comes into its own when it comes to shifting regulatory demands, not least those related to Environmental, Social, and Governance (ESG) and Governance, Risk, and Compliance (GRC) mandates.

A previous Amadeus survey ↗ on this topic with ESG senior decision makers showed that 46% of respondents anticipated investing more in ESG in 2024 than they did the year before.

46%
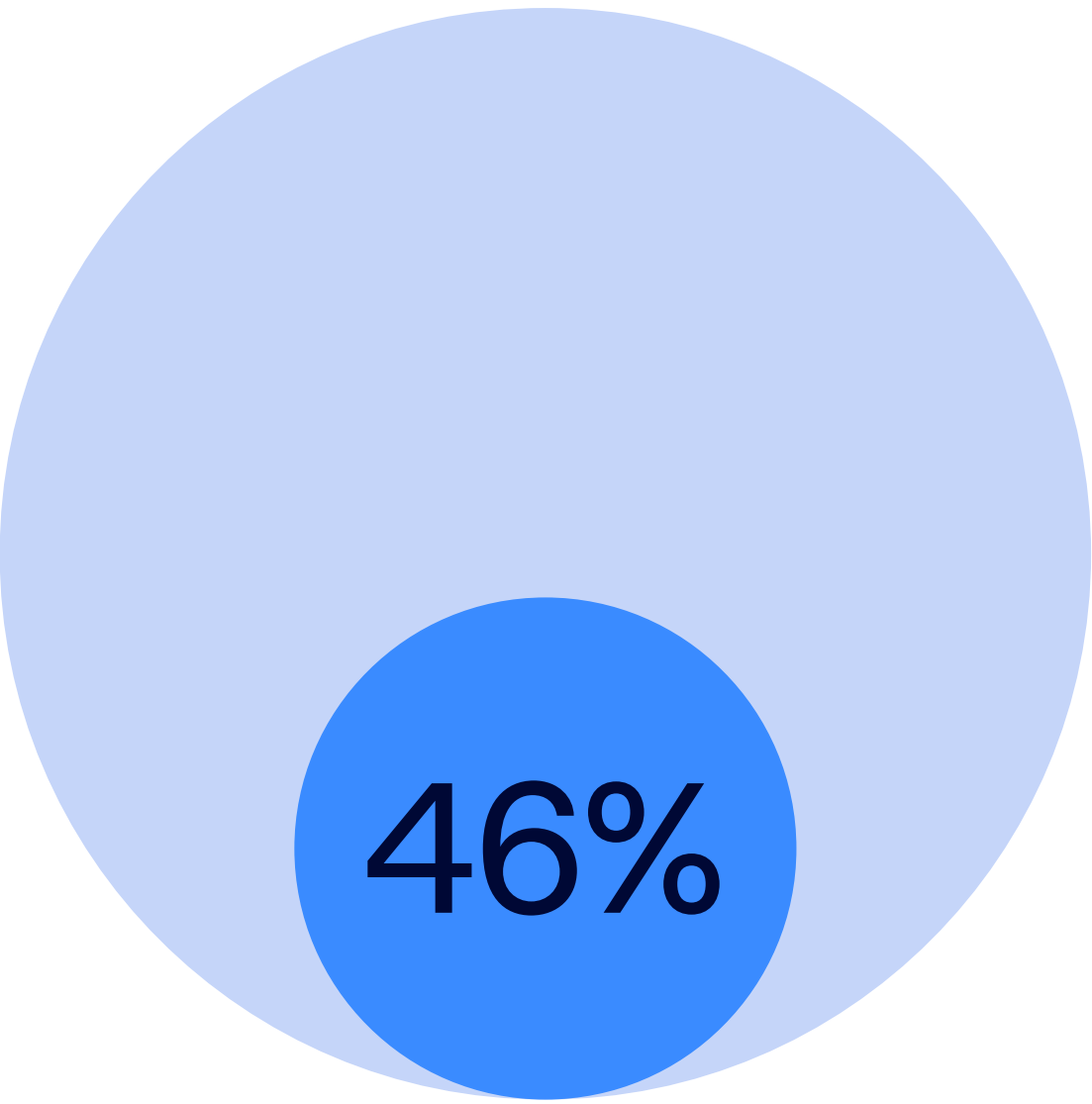
of respondents anticipated investing more in ESG in 2024 than they did the year before.

Here, specialist corporate teams can share detailed insights into a variety of factors which will impact financial and sustainability reporting, including understanding the carbon impact of every trip and having the ability to scale this up across the entire business.

With Amadeus Cytric, the online travel and expense management platform, natively integrated in Microsoft Teams, travel managers gain science-based CO2 reporting to follow up on company business travel targets and compliance. Cytric enables travel managers to encourage travelers to select more sustainable options with carbon calculations display, flights and rail side by side comparison, as well as the HRS Green Stay ↗ label for certified hotels.

With Amadeus Cytric travelers can identify opportunities for ride sharing when arriving at the same destination with other colleagues, reducing costs for the company and minimizing the impact on the environment. It also helps with carbon emissions reporting, while supporting compliance with the corporation's sustainability agenda, and helps devise a carbon emissions budget to control the travel program's sustainability impact.

Similarly to the leisure traveler, these insights can also be shared within the hospitality industry where managing hundreds of bookings can identify new trends and demands from the corporate arena. There could be a surge in searches for hotels with in-house gyms or wellness facilities, for example.

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"Central to the role of third-party corporate travel agencies is trust and thus becoming an extension of their corporate responsibilities.

"Clients need to rely on TMCs to book travel in line with their internal policies and restrictions, with objective stacking a key example here. Travel consultants have the opportunity to plan complex trips using AI tools to refine itineraries that deliver what the employee needs without compromising company values, culture and compliance."

Steve Banks

CEO,
Travel Division for The Human Network

HUMAN NETWORK™

The rise of 'objective stacking'

Equally, there are evergreen demands of the business traveler that can be relayed or reasons why bookings are trending upwards or downwards. On-site working spaces will naturally make a destination more attractive for the traveler who needs to work abroad for a few days – the hotel which offers this at the right price will naturally get the bookings.

For the business traveler, being away for a period rather than single meeting trips is driving the 'Objective Stacking' trend. This is about employees arranging trips to fulfil multiple goals. This trend is also driven by the need to derive maximum value from each trip, balancing fiscal and environmental responsibilities.

The Amadeus Cytric AI Assistant is an innovative example of how generative AI can support corporate travelers and travel managers. Travelers can chat naturally through Microsoft Teams for assistance with trip planning and booking. This new tool helps reduce booking time by selecting optimal hotel and flight options based on company policies and user preferences - such as automatically selecting the departure city and (soon) factoring in trip context and history, including preferred flight times or frequent company destinations.

As a next step the Amadeus Cytric AI Assistant will also aim to enhance employee collaboration by proactively suggesting complementary bookings to complete the trip booking and notifying employees when transfers can be coordinated.

This last point must be understood as business critical in the corporate travel arena, but it can't compromise the ultimate customer – the enterprise itself. Like their leisure equivalent, the business traveler has anxieties and needs them addressed. However, the procurement and financial teams' needs and demands must be considered the priority.

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"Travel management companies are transforming into hybrid organizations - we are becoming technology developers, data analysts, business consultants, and service providers all rolled into one. The traditional booking model is obsolete. Today's successful TMCs are adept at pivoting and evolving, developing proprietary tech solutions, analyzing travel patterns for strategic insights, and delivering comprehensive business intelligence. We are no longer just managing travel - we are architecting data-driven travel ecosystems that power modern enterprise decision-making."

Clive Wratten

CEO,
Business Travel Association

BTA | BUSINESS TRAVEL ASSOCIATION

The check-in experience

The curb-to-gate journey

Arriving at the airport is undoubtedly one of the most important moments of a trip away. It's when the traveler knows (hopefully), they're on time for their flight and at the right terminal. The need for such confidence cannot be underestimated; our research revealed that more than a quarter (27%) of travelers feel anxious about traffic preventing them from getting to the airport, and 23% worry about arriving at the wrong terminal.

Top concerns for travelers

27%

of travelers feel anxious about traffic preventing them from getting to the airport

23%

of travelers feel worry about arriving at the wrong terminal

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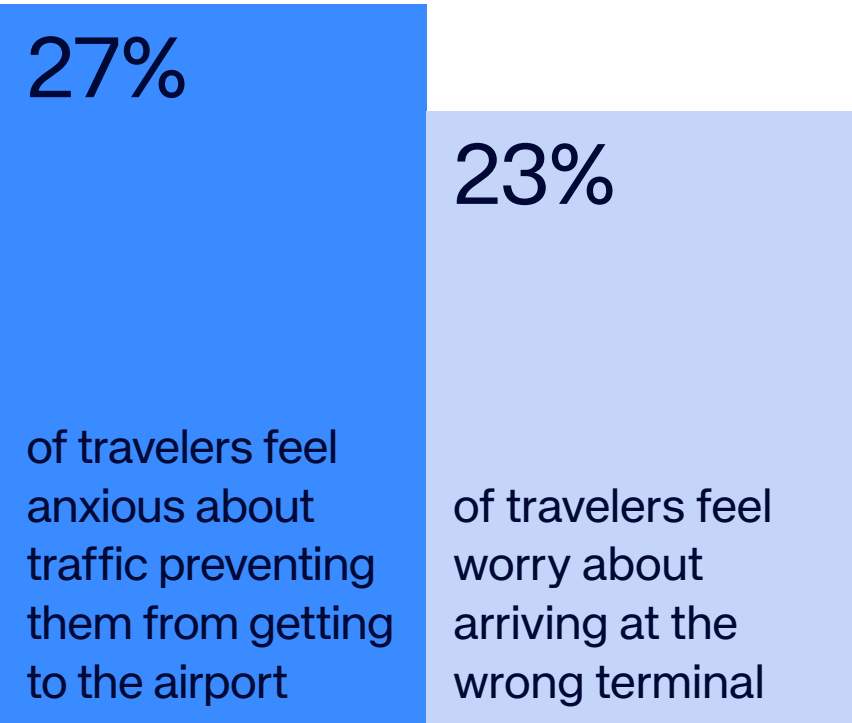
This latter statistic demonstrates the need to prepare the traveler before they leave their house – the trip to the airport starts before the front door closes. There can't be a mismatch between what companies think travelers already know and what they *actually* know. This can easily be rectified by a more proactive sharing of information or developing knowledgeable, travel friendly chatbots on the passenger's device or on the booking website.

Once at the airport, smooth, fast check-in is critical in ensuring a seamless next step in the curb-to-gate journey.

As a result, it's an area that has seen a significant amount of investment and innovation to drive the transformative change necessary. Again, research proves this need, with

26%

of travelers citing long queues for check-in as a point of anxiety during a journey. Dissipating these nerves brings a significant amount of relief.

Thanks to new, transformational technologies, we are likely to see the traditional check-in disappear altogether in many places.

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Biometrics reign supreme

Arguably the most critical part of the infrastructure transforming the airport experience is the evolution of biometric solutions. These focus on identity verification through physical traits such as fingerprints, facial recognition or iris scans – traits which are very difficult to hack, and mostly connected to government issued electronic travel documents.

The use of biometrics accelerates check-in and acts as a foundation for movement and access throughout the airport, including security, border control and boarding. It enhances safety, reduces manual document checks, and streamlines passenger flows, creating a faster, more secure and convenient journey for the traveler.

In mid-2024, Curaçao Airport launched the world's first pre-flight biometric digital ID verification - the Curaçao Express Pass - for contactless border crossing. It's powered by Airside, an Entrust company, that specialize in privacy-based digital identity sharing in combination with Amadeus' Identity and Border Management Platform and eGates at the border. The initiative allows travelers prior to their journey, to share government trusted and verified ID with immigration authorities at the destination.

This means that on disembarking the plane on their way to immigration, the passenger's passport and biometric data were already shared with the immigration system, using the traveler's smartphone. They can then access a separate enhanced immigration lane where facial-matching technology allows travelers to simply walk through immigration with back-end clearance from the authorities.

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Passenger-first experience

Self-service solutions and the application of biometrics are expected to revolutionize the airport experience. In fact, at JFK International Airport Terminal 4, the check-in process has already been reduced to just over a minute, and bag drop even less. This significant cut to wait times has been achieved following the installation of kiosks and self-service bag drops as part of a major transformation project with Amadeus.

This drastic reduction is bringing a new dimension to the airport experience.

With more travelers using self-service options, this frees up agents to focus on supporting passengers who require special assistance or have specific requests, offering a differentiated experience.

In this regard, the solutions act as a filter to help those who need it, rather than everyone struggling to align with the identical processes involved with manual check-in. By offering passengers the choice to use automation or traditional agent-led servicing, terminal infrastructure can be fully optimized. This results in more pleasant terminals designed around leisure activities, where agents can roam and serve passengers from a tablet device.

"We've created an open floor concept where passengers are free to come in, do their transaction and leave at their own pace."

Joshua Diamond

Manager, Capacity and Automation (Operations), JFKIAT

"They check-in, drop their bags and off they go on the rest of their journey without really having to stop."

Susana Desa

VP, Operations, JFKIAT

"We're more efficient operationally, and this brings a lot of smiles to our customers."

Edmund Quintana

Senior Project Manager (Terminal Redevelopment), JFKIAT

JFK INTERNATIONAL AIR TERMINAL

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Scaling biometrics for seamless travel

Dubai International Airport offers a compelling example of how biometric and self-service solutions can be scaled to support a seamless curb-to-gate experience. This is a result of over a decade's worth of investment in the technology as part of the city's ambition to become one of the top three tourism destinations by 2030.

This target simply can't be achieved without a cutting-edge airport through which to welcome visitors. As a mark of the progress toward this goal, the airport became the world's busiest in 2024 with over 92 million international passengers – a figure achieved while concurrently investing in innovation and building future-proof technology solutions.

The solutions that enable this growth come through a collaboration with Amadeus, and forms the center point in a collaborative ecosystem spanning the airport, Emirates and the Dubai government. Across the stakeholders, the airport provides more than 300 biometric touchpoints, including Automated Border Control gates, and a wide range of self-service kiosks, bag drops and boarding gates. The result is a more efficient and streamlined experience for the thousands of passengers passing through the terminal every day.

The shared focus on innovation and operational efficiency has allowed Dubai to integrate biometric systems in a way that supports both scalability and passenger satisfaction. As the airport continues to expand its capabilities, it provides a useful reference point for other hubs exploring similar digital transformation strategies.

Across the stakeholders, Dubai airport provides more than 300 biometric touchpoints, including Automated Border Control gates, and a wide range of self-service kiosks, bag drops and boarding gates.
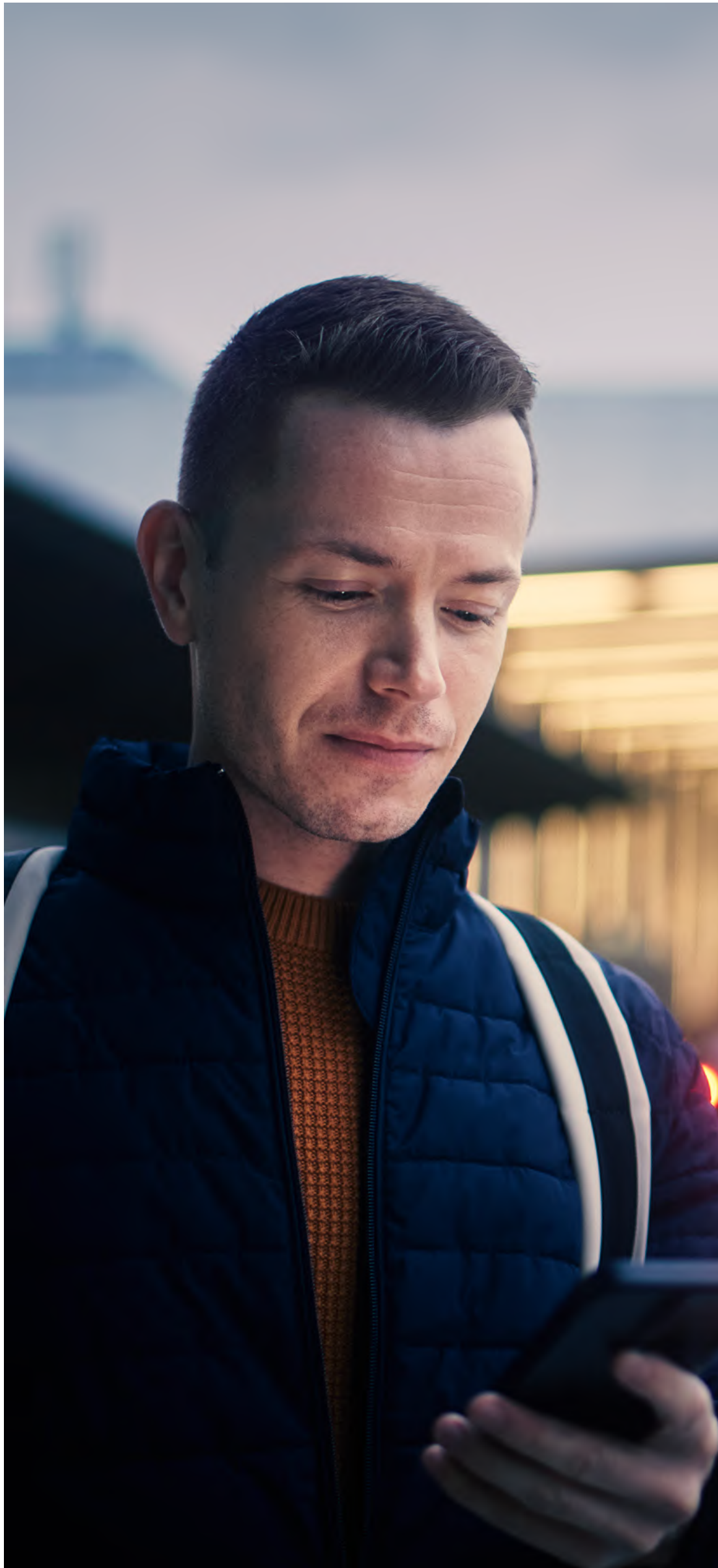
Scaling self-service for efficiency and accessibility

Heathrow Airport, the UK's busiest aviation hub, has undergone a significant transformation in recent years by embracing self-service technologies to streamline passenger processing. With nearly 85 million passengers passing through in 2024, the airport faced mounting pressure to improve operational efficiency and enhance the traveler experience.

Managing this significant growth in passengers has been eased through self-service check-ins and bag drop – without compromising existing quality of service and uptime.

Since its initial pilot of Auto Bag Drop units in 2012, more than 260 self-service bag drop units have been deployed across Terminals 2, 3, 4, and 5, supported by over 250 check-in kiosks. This is facilitating faster movement around the terminal (in July 2025 alone, Heathrow recorded approximately 1.4 million combined kiosk transactions and bag drops).

At peak times, Heathrow's bag-drop units have processed up to 1.5 bags per second, demonstrating the scalability and reliability of the system. These touchpoints, powered by Amadeus, handled over 13 million passengers in 2024, contributing to smoother flows and reduced congestion across terminals.

The shift to automation has not only improved throughput but also allowed airport staff to focus on assisting passengers who require more personalized support. This human touch element of technology is critical when looking at the impact of solutions; here, staff can spend more time with those who need it while others breeze through. It's effectively optimizing customer engagement.

Heathrow's journey reflects a broader industry trend toward self-service and automation as enablers of transformation. By investing in scalable, inclusive technologies, the airport has positioned itself as a leader in modern passenger processing - balancing efficiency with accessibility and setting a strong example for other global hubs navigating similar challenges.

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The security experience

Game-changing biometrics

Arguably, when considering how in-airport security has been improved over recent years, the advancement in biometrics sophistication and subsequent deployment has been the ultimate catalyst. It's fundamentally transforming journeys for travelers, making the airport experience frictionless and more enjoyable without compromising the integrity of security processes.

It's removed the need for multiple verification checks throughout the terminal journey which has made passage smoother, faster, and fundamentally more secure – eliminating the need to carry around physical identity properties (tickets, passports) so they're less likely to be lost, misplaced, or stolen.

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One-time registration

The key to the success of biometrics (from operational and security perspectives alike) resides in its simplicity to establish traveler identity digitally linked to a government trusted document or an airline issued boarding pass. A single point of authentication at the outset means that the subsequent verification points are instantaneous and contactless.

This happens predominantly between check-in (at home or at the airport) and bag-drop. The passengers register their biometric data - mostly through facial recognition solutions - in combination with their travel document authentication. This is done at automated, self-service kiosks and stored on the traveler's mobile device and relevant app.
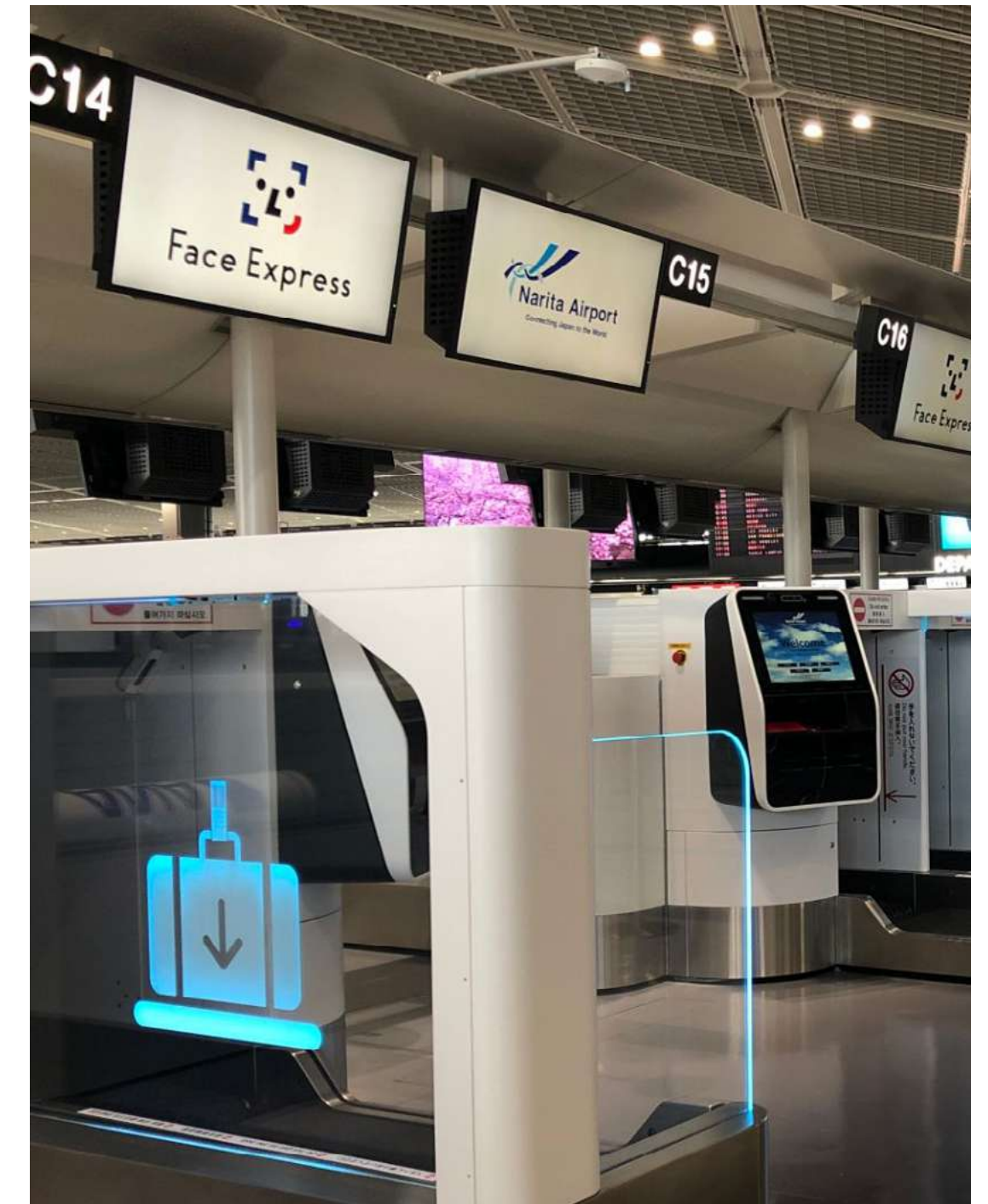
As the passenger makes their journey through the terminal, this biometric data is then shared on a need-to-know basis with the relevant security and access control actors throughout. Importantly, verification can be done without physical checks - it's all handled through facial recognition devices sustained by a scalable software called an Identity Management Platform (IMP).

'Ready to Fly'

As biometric solutions become increasingly sophisticated, the 'ready to fly' model for travel will become more normalized. These solutions involve regulatory governmental, and police checks well ahead of arriving at the airport, meaning that the traveler only needs to arrive at the terminal and walk straight through. Visa controls, e-passports, and security clearance are pre-approved ahead of time, removing any friction.

The Amadeus Seamless Corridor and free flow technology is at the cutting-edge of what can be achieved. This innovation replaces 'stop-start' and 'one-at-a-time' gates with wide corridors hosting sophisticated AI-enabled processing. It's capable of identifying multiple passengers while in motion by verifying ID with mobile apps or biometric wallets.

The corridors, currently being tested in production at several pilot airports, are demonstrating previously unimaginable levels of convenience and speed. Results demonstrate the ability to clear an individual in under ten seconds - even within groups of people walking together.

Opening up new possibilities

The nature of biometrics means that it can reach far beyond the airport terminal through the ability for hardware or software providers to integrate their own solutions into the ecosystem. When we consider the door-to-door journey, there are obvious points of adoption. For example, car rental firms could use facial technology to confirm hiring criteria or hotels can use it for contactless check-in or in-house services and facilities access.

However, the technology can also apply once the holiday or business trip is underway. Biometric authentication can revolutionize the ability to integrate entertainment services with on-the-ground suppliers, with tickets purchased in advance and validated on arrival. This could even extend into insurance industries where potentially risky activities are covered once underway and ad hoc, without the need to go through lengthy online or paper-based checks and forms.

The importance of decentralization

Fundamental to the success and security of biometric technology is its use of decentralized proof of identity. Here, all information is stored on digital wallets or in-app, with verification handled locally and temporarily, using encrypted, consent-based data sharing. This boosts privacy, control, and security, as travelers decide when and where to share their information.

Beyond Amadeus' digital ID and biometric wallet, the technology is also interwoven within IATA's 'One ID' initiative, equally interoperable with the recently enhanced Apple and Google ID wallets. This means the model can deliver truly global, interoperable identity across multiple stakeholders (airlines, airports, governments). This is key when it comes to moving beyond the terminal and into other areas within the travel journey, and even into the holiday or business trip once underway.

Payment solutions

Contactless payments have long since been the norm for payments both locally and internationally. The days of queuing at the Bureau de Change for foreign currency have almost disappeared. But carrying a physical wallet still brings risk. This is where fingerprint authentication also delivers the potential to hugely reduce fraud and theft, especially in tourist hotspots. The potential to spend an entire day sightseeing or traveling between meetings without having a physical wallet or ID reduces the potential for crime.
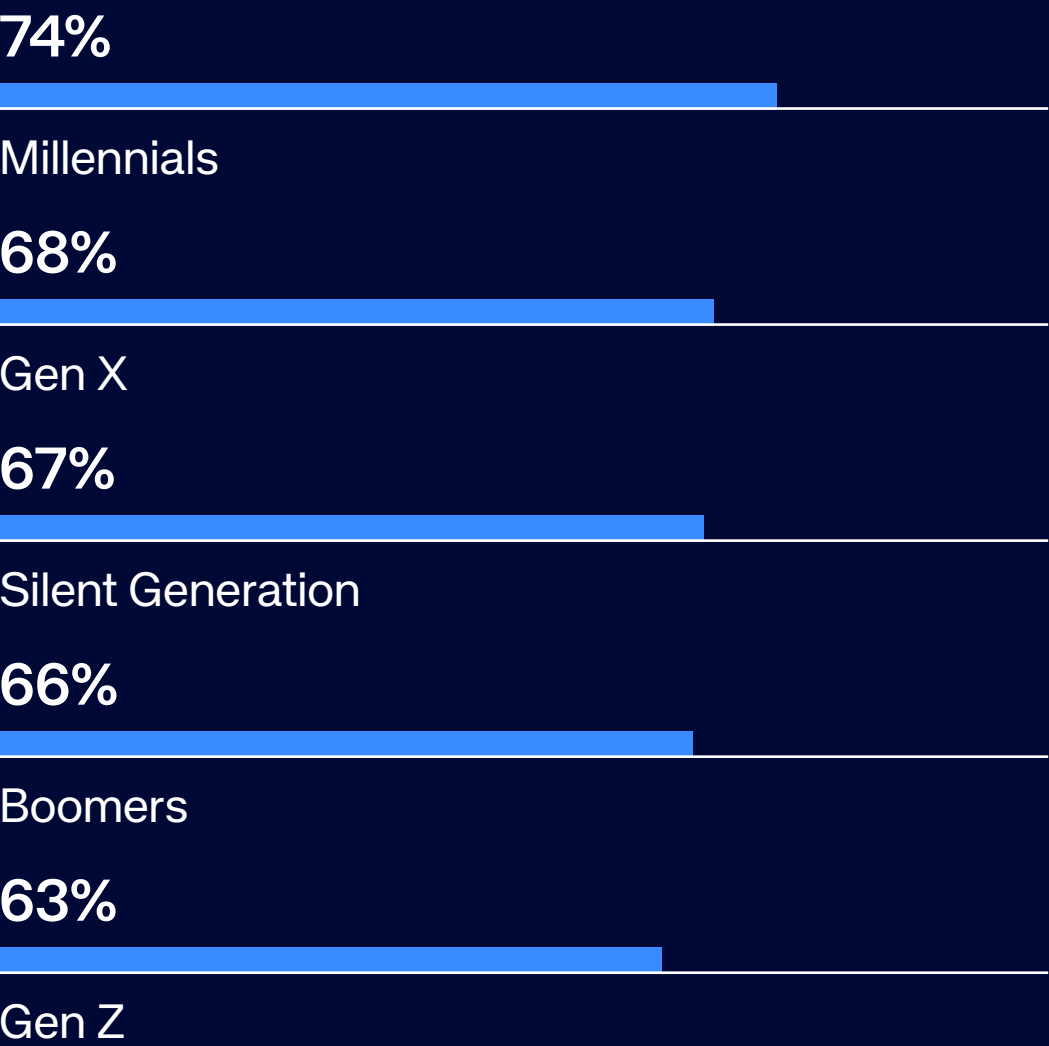
Ultimately, the use of biometric security can be applied throughout the journey and eventually undertaken well in advance. This brings the opportunity to make the truly contactless, seamless travel experience a reality. This is a move which can benefit the entire travel and hospitality industries, not least in extending ease of booking into many other areas, establishing the 'connected trip' in the process.

When asked whether they would consider **using biometric gateways so there's no need to stop and show a passport or even a mobile phone** (i.e. using face or fingerprint scanners to let you pass through airport security), an average of **69% of global travelers said they would.**

69%

Interestingly, while this differs only slightly across generations, to a factor of no more than 10%, there are clear cultural divides with 88% of Chinese travelers agreeing that they would, but as few as 54% of French passengers taking this stance.

Generational

74%
Millennials

68%
Gen X

67%
Silent Generation

66%
Boomers

63%
Gen Z

Regional

88%
China

79%
Singapore

74%
India

70%
UK

63%
Spain

61%
USA

54%
France

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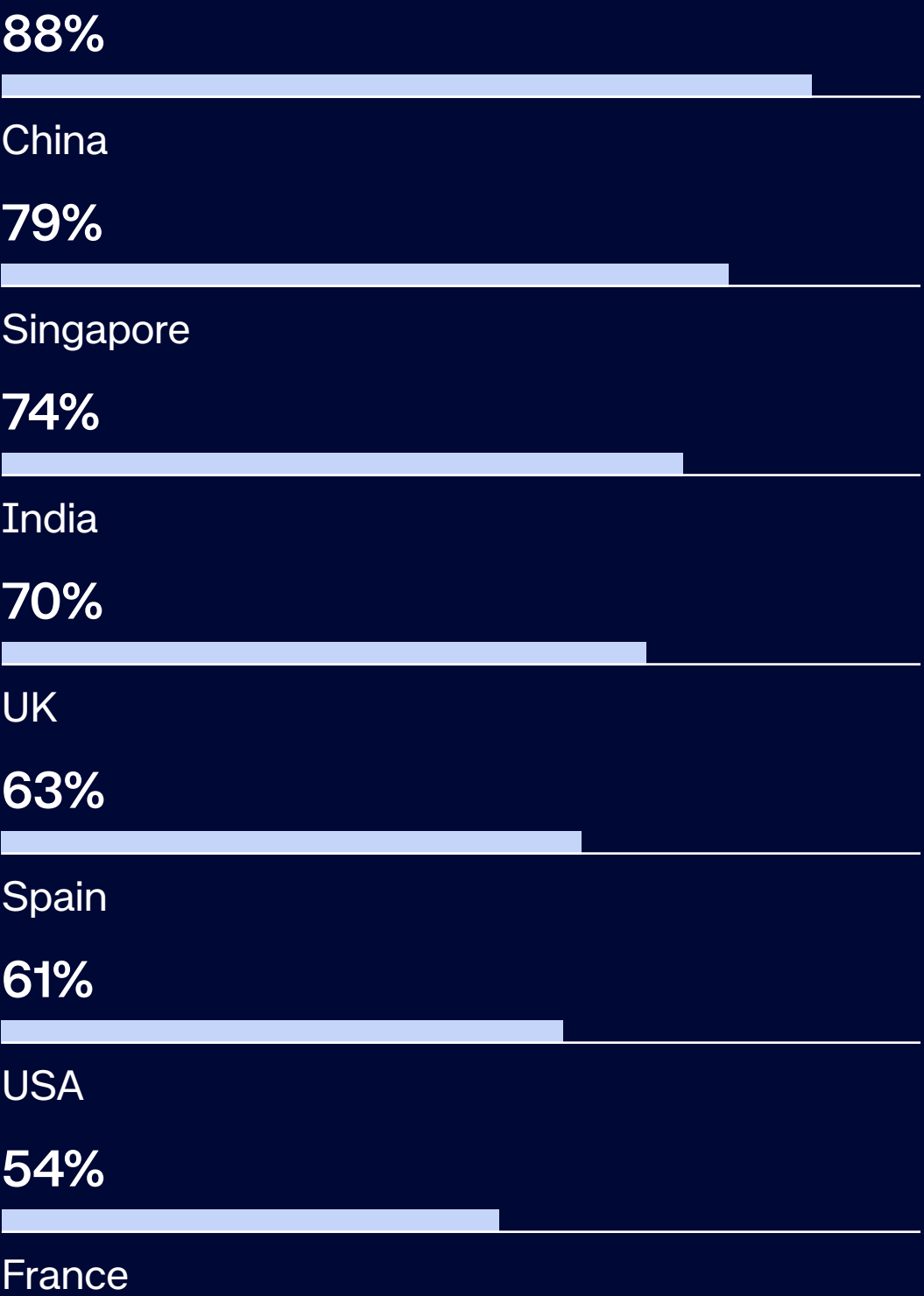
The pre-boarding experience

Taking calm for granted

Now airside, the traveler sips their coffee, eats their croissant and waits for news of their departure – hopefully on time, and hopefully at a gate that isn't too far away (our research found that 18% of travelers get anxious about having to walk a long distance).

18%

Of travelers get anxious about a too far away gate

Travelers are so used to the airport experience that there's no conscious consideration of the huge game of Tetris which goes on behind the scenes. There isn't an acknowledgement of how complex it is to ensure that the right plane is at the right gate, at the right time, with the right crew, and with the right amount of catering. And this is just one aspect of the operational puzzle.

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Silo-avoidance

Airlines and airports work well when they're operating as a unified entity – using something which Pierre-Olivier Bandet, CIO, Air France-KLM, calls 'a common currency'.

The effect of this unified approach can be witnessed at JFK International Airport too, where its use of Amadeus' cloud-based ACUS solution ensures that the single view of the customer remains true and consistent throughout over 140 touchpoints in Terminal 4.

This approach is echoed through Amadeus' Virtual Airport Operations Center (APOC), a pioneering approach built in partnership with Microsoft and its expertise in cloud technologies. It acts as a centralized hub bringing together data from across the airport ecosystem to give an unrivalled view into operations for all those responsible for planning and service delivery.

Planning for all eventualities

Successful unification requires continuity. Interruptions to the process of bringing all pieces of the puzzle together risk slowing it down or throwing it off course entirely. As such, scenario planning is crucial to run through all possible eventualities and prepare accordingly. This removes the risk of operational downtime should disruption happen. This preparation doesn't only inform response approaches from an operational perspective, it can also prepare the communications structure for passengers, airport staff, and crew alike.

"Operations within the travel sector often deal with unplanned events and their impact, which places a high value on information timeliness and accuracy. This is hindered, however, through an inability to view real-time or near real-time operational data due to information that is contained in many disparate systems.

"The adoption of platforms that unify across siloed data estates enable holistic views of business operations, resulting in more optimized forecasting and planning systems."

Julie Shainock

Global Travel and Transportation Industry Leader,
Microsoft

■■ Microsoft

Holistic agility

A core critical approach to improving the passenger experience today relies on replacing Departure Control Systems (DCSs) with more modern Delivery Management systems (DMS). These sit at the epicenter of airline operations and extend control and visibility beyond passengers to the entire airline operations including real-time dynamic gate allocation and on-the-ground resource management, ensuring buses, aircraft tugs, and boarding stairs are where they need to be. This agility is made possible through cloud-enabled connectivity allowing for real-time analysis.

This data-driven insight uses machine learning capabilities to subsequently allow operational teams to make informed, confident decisions that optimize operations and processes – including anticipation of traveler needs and appropriate proactive responses. It helps create the great experience expected throughout any journey.

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Removing anxiety through insight

A multi-touchpoint understanding of every traveler can enable personalization to deliver tailored offers throughout the journey and in doing so, create a foundational, unified, traveler profile. When it comes to driving loyalty, this is crucial – as humans we all want to feel recognized, understood, and valued.

Not knowing what's happening is unnerving in any journey, but presenting options and up-to-date information across all airline touchpoints ensures the traveler remains informed. The insight also allows the airline to pre-empt issues; and either ensure they're stopped before they happen or are resolved swiftly, subsequently reducing their impact.

Delivering this when travelling (which is embedded in scenarios where hope for a smooth experience sits side-by-side with varying levels of anxiety), makes for an enjoyable, stress-free journey.

Creatures of airside habit

It turns out that leisure travelers love a routine. Amadeus research uncovered several touchpoints airside where passengers have developed specific habits while waiting for their gate – they've become a core part of any holiday!

Indeed, when asked whether they 'follow a ritual' at the airport, 81% of those on a family trip or a trip with a partner agreed – dropping only slightly to 79% of those on a trip with friends or 72% of those travelers on a solo trip.

81% — Family trip or with a partner

79% — Trip with friends

72% — Solo trip

In terms of what these rituals are:

34%

Of travelers on a trip with friends will have a drink at the airport bar

29%

on a family trip will buy travel essentials in the airport (e.g., suncream, shower gel, etc.)

27%

on a family trip will buy entertainment for the journey (e.g., magazine, crosswords, etc.)

36%

of those on a family trip or a trip with a partner will go shopping in duty free

36% — Family trip
35% — Trip with a partner
32% — Trip with friends

Will eat at the same restaurant or cafe

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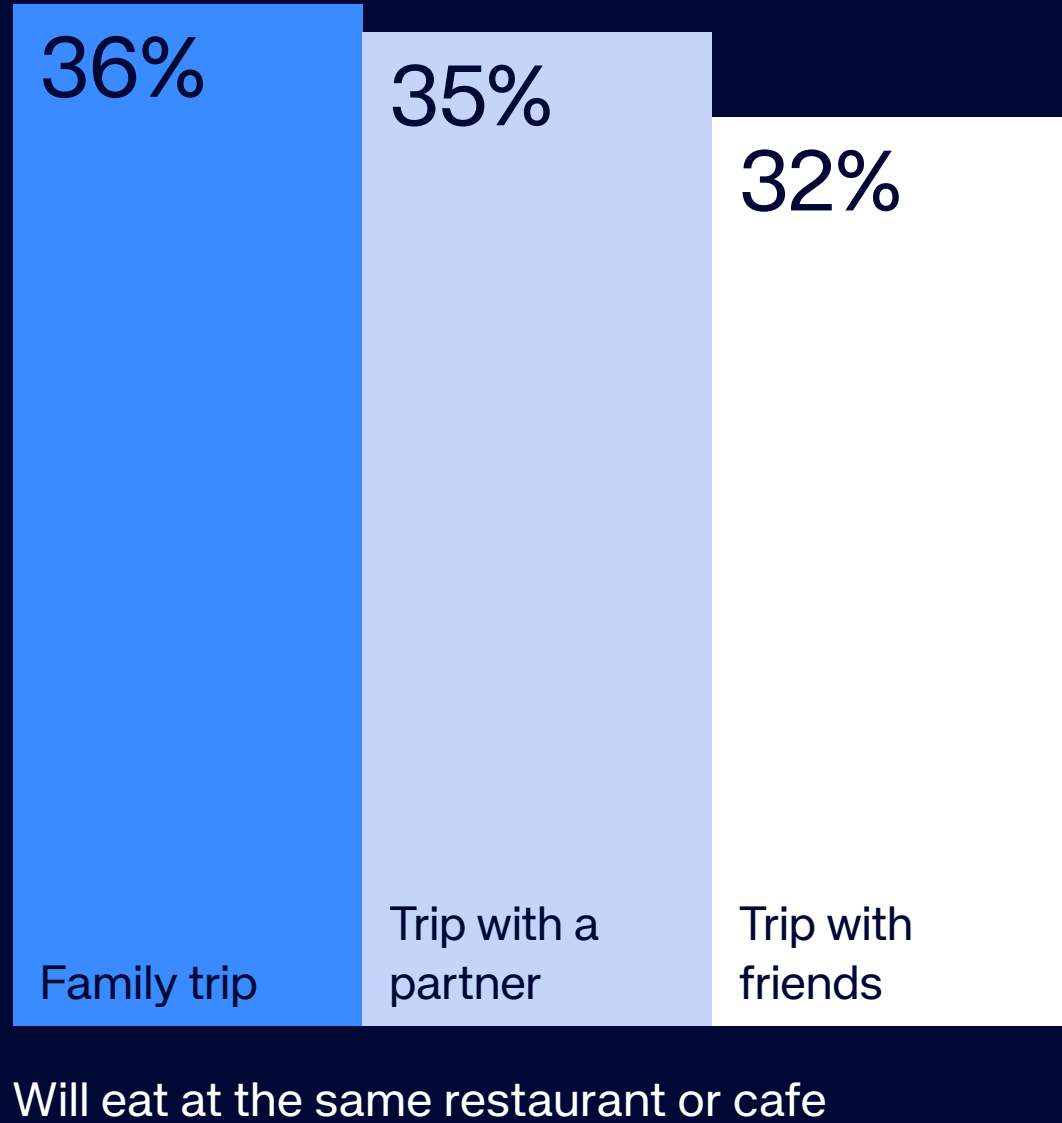
The in-flight experience

Maintaining the personal touch

It's been over twenty years since Lufthansa began offering in-flight WiFi, first offering device connectivity, and subsequently ushering in a new era in entertainment in the process with the increased bandwidth and functionalities this technology brought. Today, video and catch-up services are an expected and intrinsic part of any trip.

The in-flight experience actually starts with trip inspiration and booking. The whole process from pre-trip to in-trip continues to evolve with a focus on technology that enables highly personalized journeys. Based on IATA's Offers and Orders shift from legacy architectures and processes to a more modern retailing environment, pioneering Finnair became the first global airline in 2025 to create a native order. The airline says this new approach will ultimately benefit customers at every touchpoint and enable it to deliver frictionless experiences.

This transformative shift in airline retailing is opening up a breadth of opportunities through highly targeted promotional and upgrade offers. And through the use of a unified record in an order, it's also extending the reach of customer support through both Agentic AI systems and dedicated agents.

End-to-end orchestration

Personalization is only possible through a unified approach throughout the order chain – one which now extends into the air. Retailers are able to receive and process a service request from the traveler and, in turn, agree this transaction with the supplier in order to confirm inventory.

This could include a hotel upgrade or transfer on arrival at the airport alongside strategic commercial partners in leisure, entertainment and corporate services. This gives ultimate flexibility (and control) to the passenger – decisions don't all have to be made ahead of the flight and can be adapted to suit circumstances. As an example, in the event of flight delays, travelers can update their ground transport accordingly without having to placate a very fed-up taxi driver who's been waiting an hour.

Journey orchestration means travelers no longer need to update all suppliers when their order changes, this will happen automatically, with the retailer keeping an up-to-date view of which services have been delivered to the traveler.

Enhancing the in-flight experience

These services rely on modern airline retailing solutions such as Amadeus Nevio – a modular, AI-powered platform that enables airlines to craft personalized, context-aware offers during the journey. It enables one-click payments tied to the traveler's profile, allowing upsells like seat upgrades, lounge access or baggage offers in real-time, and even post-disruption.

Payment flexibility is changing traditional in-flight operations. Whereas midair meals would likely be agreed in advance as part of the booking, the opportunities now exist to be able to offer more of an 'a la carte' solution. Air France-KLM is one airline looking at enhanced options for premium flyers with the option of Michelin-starred chefs being trialed on some routes.
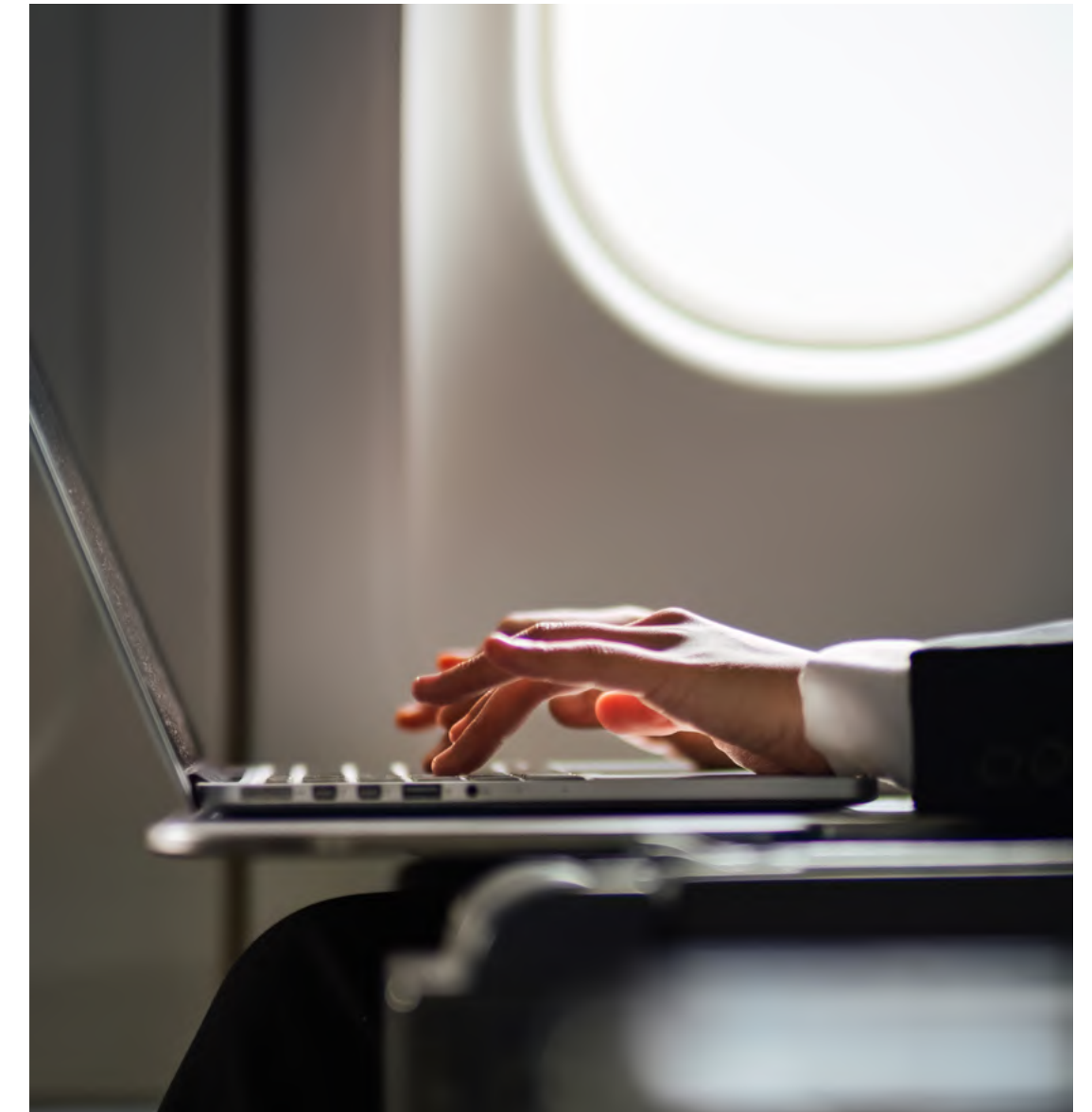
Next-generation entertainment

Many in-flight catch-up TV and film offerings currently rely heavily on pre-installed content stored onboard, which are downloaded and stored on the aircraft's media server before take-off. This approach offers full stability in playback and access, although has obvious limitations in terms of content.

However, advances in connectivity are changing the status quo significantly – not least through the Starlink satellite network and emerging 5G-to-plane technology. By taking advantage of these solutions, airlines are able to stream live sports and TV as well as access to personal subscription platforms such as Netflix, Disney and Spotify.

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Some airlines have also been testing LiFi connectivity – a light-based approach to network connectivity which offers 100× faster speeds and improved data security. Importantly, from an operational perspective, this also includes reduced electromagnetic interference. This kind of experimentation is evidence of transformational thinking and an open mindset.

Where big opportunities lie ahead are in a hybrid approach to manage bandwidth while ensuring no-one has to compromise on what they want from their entertainment offering. Pre-installed material gives the stable experience for those happy to watch from fixed catalogues, while those looking to live or personal content can equally watch without interruption.

Additionally, the innovations brought to the table through AI can enhance the traveler experience. Airlines are using AI to offer personalized entertainment options that align with passengers' viewing histories and interests. Thales FlytEdge ↗ is one such initiative, which is making "intelligent" recommendations to elevate the in flight experience and enhance the passenger experience.

Investment in AI and data analytics will be the catalyst to hyper-personalized solutions. These will boost loyalty and drive brand differentiation, which together can be the decisive factor in the traveler's choice of operator.

An immersive future?

Outside of connectivity, advances in hardware are bringing game-changing developments to the in-flight experience. OLED manufacturers are already creating transparent overlays for airplane windows, bringing the promise of augmented reality (AR) immersion.

In this instance, a passenger can look out of the window and get an insight into landmarks or an update on exactly where they might be on their trip – with increasing accuracy as the tech develops. (An exciting development for those who stare out of the window near arrival trying to see their house).

In time, this can go beyond signposting – imagine the potential for parents to educate their children on their destination and point out geographical points of interest throughout a flight or be able to demonstrate how clouds form as they fly over them.

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Knock-on benefits

Interestingly, these also bring potential environmental and operational efficiencies, with the slim glass used for OLEDs a viable, equally robust alternative to traditional (thick) aircraft windows. While there's no question of compromising structural integrity for the sake of AR, as shown by the likes of Boeing and Airbus considering how to integrate next generation solutions, fresh approaches to hardware will arise.

Beyond AR, both Boeing and Airbus are looking at how technology solutions can improve operations, especially when it comes to maintenance and inefficiencies. These have a significant knock-on effect to the traveler in reducing downtime, improving service quality, and identifying issues ahead of time.

Both operators are looking at digital twin ecosystems which can predict and diagnose technical issues in advance – increasing the speed of resolution. Optimization of fuel usage can be understood through real-time analysis of weather conditions, and other influences on consumption.

In the longer-term, automated taxiing, take-off, and landing solutions through VR and AI analysis can minimize pilot workload and allow focus to be centered on where human control is most required.

Shortening time perception

In addition to augmented reality, immersion through *virtual reality* (VR) has significant potential, not just in enhancing solutions but at a bigger level in reducing how flight time is perceived. While a two-hour film will pass the time, it's still a small screen with distracting peripheral vision. The opportunity VR brings through full immersion – be it gaming or video – can isolate the passenger from the whole cabin, making time pass quicker and the flight perceptively shorten. Boredom can be a thing of the past.

Adoption won't be straightforward, however. Beyond the connectivity demands when used at scale by dozens of passengers, the cost of implementation and maintenance has to be justified to drive mass adoption.

The baggage experience

"Breakfast in London, dinner in Rome, luggage in Honolulu." – anonynmous

Once checked in, it's taken for granted that your baggage will be waiting for you at the end of your journey, often without a true appreciation of the sheer scale of the operations involved. IATA's data puts the total number of bags carried each year by air at over *four billion*, with 99.57% arriving on time and in the right place – a herculean feat. Despite this low error rate, anxiety about bags going missing remains disproportionately high among travelers, with 29% of respondents to an Amadeus survey citing the mere possibility of losing baggage as worrying.

29%

of travelers citing the possibility of losing baggage as a source of anxiety

99.57%

of bags arriving on time and in the right place

Source: iata.org ↗

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This explains why some travelers have taken to placing Apple AirTags in their luggage to do their own tracking. Seeing this grassroots development, some 30 airlines are also on board with Apple's 'share item location' feature.

Baggage handling is also being addressed through increasingly smart technology - a development which echoes passenger appetite for such solutions. Of those surveyed, 26% of respondents said smart baggage tracking through GPS or airline apps would alleviate nerves, with 23% agreeing that clear, in-app updates on baggage rules and security requirements would do the same.

26%

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23%

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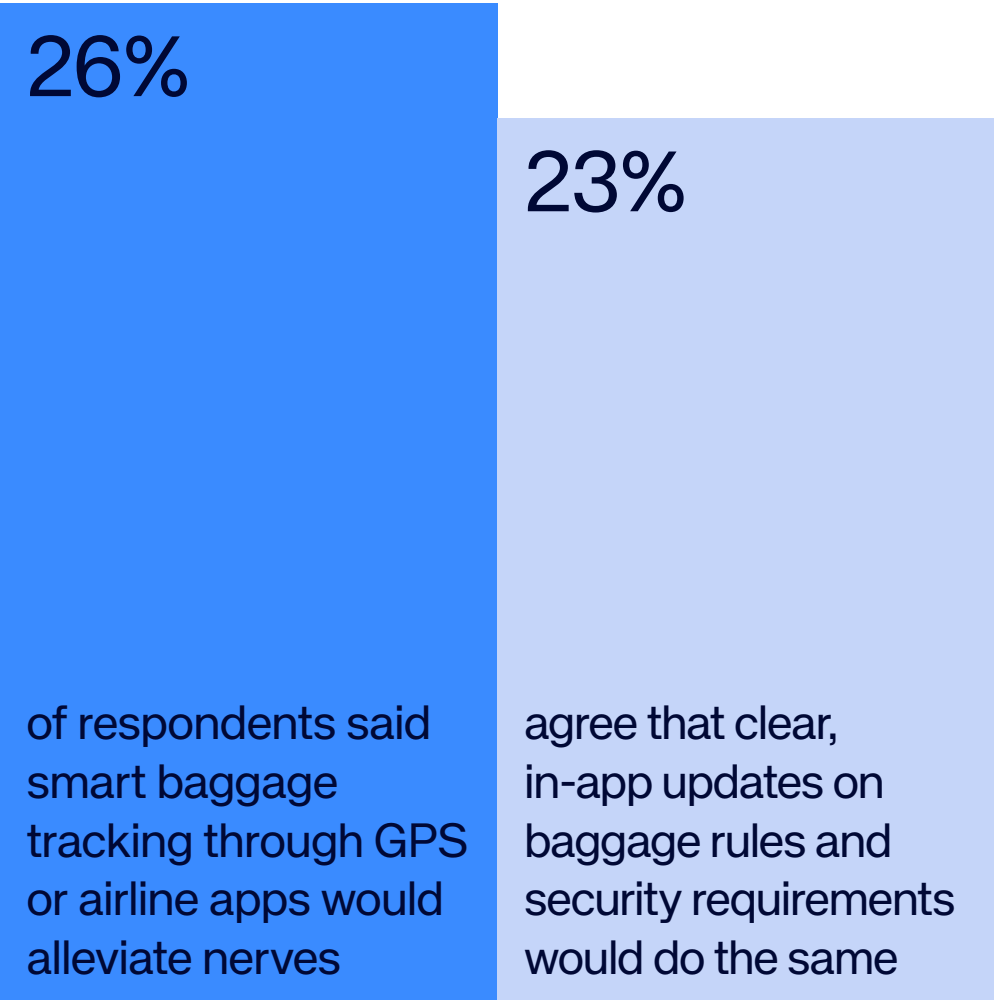
Data-driven insight for tackling bottlenecks

The implementation of AI is enhancing the ability to predict pinch points and address them in advance, as well as react to, and resolve operational issues in real-time to minimize delays.

An example of this is where disruption arising from a weather event may lead to a plane carrying a passenger's luggage arriving late at its destination and the connecting flight departs without the bags. By noting this in advance, AI-driven analysis can understand where to reroute the baggage to and ensure any delay in arrival at the traveler's destination is reduced and inconvenience curtailed.

Rerouting operations staff to handle changes in schedules can also tackle disruption, through addressing peak arrival and departure times, prioritizing handling appropriately to ensure backlogs don't occur. This also ensures that delays with baggage carousel collection are minimized, meaning travelers' journeys through the airport are smoother and congestion can be addressed head on. This has the knock-on effect of avoiding any delays for others traveling through the terminal.

Future technologies

AI is already making significant improvements to tracking luggage and creating smart, reliable predictive modelling for baggage handling, as well as streamlining reactive demands. But there are many additional solutions, and many in early stages of experimentation and implementation.

As well as tracking and recovery, these can allow optimization in logistics, aligning priorities with loyalty and premium memberships, or to passenger movements. One example of the latter is when a flight departs without a passenger's bag, the destination airport receives immediate notification. This enables the airport to proactively inform passengers upon arrival that their bag didn't make the connection, along with confirmation that it will be delivered directly to their address. This approach reduces passenger anxiety, minimizes frustration, and creates a significantly better overall passenger experience.

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Handling solutions

It's possible to look at baggage through two different lenses when we consider how technology is going to optimize systems. Firstly, there's the handling itself – moving the bag from A to B. Secondly, there's the tracking and maintenance – making sure the bag follows the path intended (and finding it if it diverts from this path).

When looking at the handling itself, advances in robotics will see increased efficiencies when it comes to getting items on the right flight and back off the other end. It's possible to pick up baggage from drop-off (self-service kiosks, naturally), take them to the right plane and disembark the bags. Upon arrival, robotics help ensure the bags are deposited at the right carousel having undergone the appropriate checks.

Digital Twins will also play a role here in terms of mapping the workflows and predicting potential pinch points. Here, a real-time digital replica simulates the airline's operations and identifies problems in advance, based on previous experience and scenarios. This iterative learning approach will continually optimize operations.

Tracking technologies

IATA has put in place a target for 100% of baggage to have some form of RFID (Radio Frequency Identification) in place by 2030. RFID uses radio waves to automatically identify and track tags – in this instance, those attached to luggage. By putting this in place, airlines will be able to pinpoint exactly where a bag is and reroute it accordingly. It will also directly address traveler unease related to not knowing where baggage is and allow for the in-app alerts and updates that are evidently hoped for.

100%
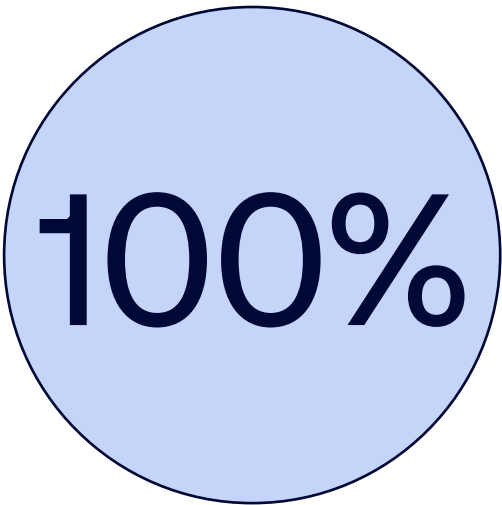
IATA target:

of baggage to have some form of RFID will be put in place by 2030

Blockchain technology could also provide robust (indeed, immutable) understanding of where an item is at any given time. At every stage of the journey a record of where the bag has passed will be registered on a blockchain – an act which is impossible to alter, even by those with admin rights or by third-party bad actors. The approach aims to create total trust and transparency when it comes to where a bag has been, who it has been handled by, and where it currently stands in its own journey.

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Security and safety

Beyond the logistics of an item, ensuring ownership remains a critical factor – not least when it comes to safety and security. The use of biometrics here is key through linking the bag to secure information captured ahead of the journey or at bag drop, where automated check-in kiosks are capturing facial and fingerprint recognition data.

Combined with capturing bag images during check-in and leveraging AI-powered computer vision technology, specific bag characteristics can be identified and catalogued and linked to passenger biometrics. These bag images and their detailed descriptions serve as valuable data points for tracking luggage throughout its journey, enabling bags to be mapped across all end-to-end touchpoints in the travel process. These capabilities in particular will speed up the process of identifying bags for ground handlers, either to identify misplaced luggage for travelers, or to off-load a bag in a scenario where a bag has been checked in, but the passenger has not boarded – a standard procedure to prevent smuggling. This needs to be executed as quickly as possible to prevent delays.

Constant improvement

While the solutions above won't entirely remove challenges when it comes to baggage in transit, they can improve them. Known challenges (and, in the instance of crime, loopholes), can be overcome and the overall passenger experience can be constantly improved.

In doing so, any anxiety about bags going missing can be reduced. And, in the event of any unforeseen issues, technology facilitates a swifter identification of where an item is, alongside the AI-driven sophistication of how to get the bag delivered to where it needs to be. And all this done faster than has even been possible before.

The speed and quality of the resolution can become, like mitigating friction elsewhere in the journey, potentially a loyalty and reputational driver.

As an instance of this, airlines are delivering fast authorization of emergency shopping trips to travelers to get what's needed to survive the first night while baggage is being tracked down. When communicated
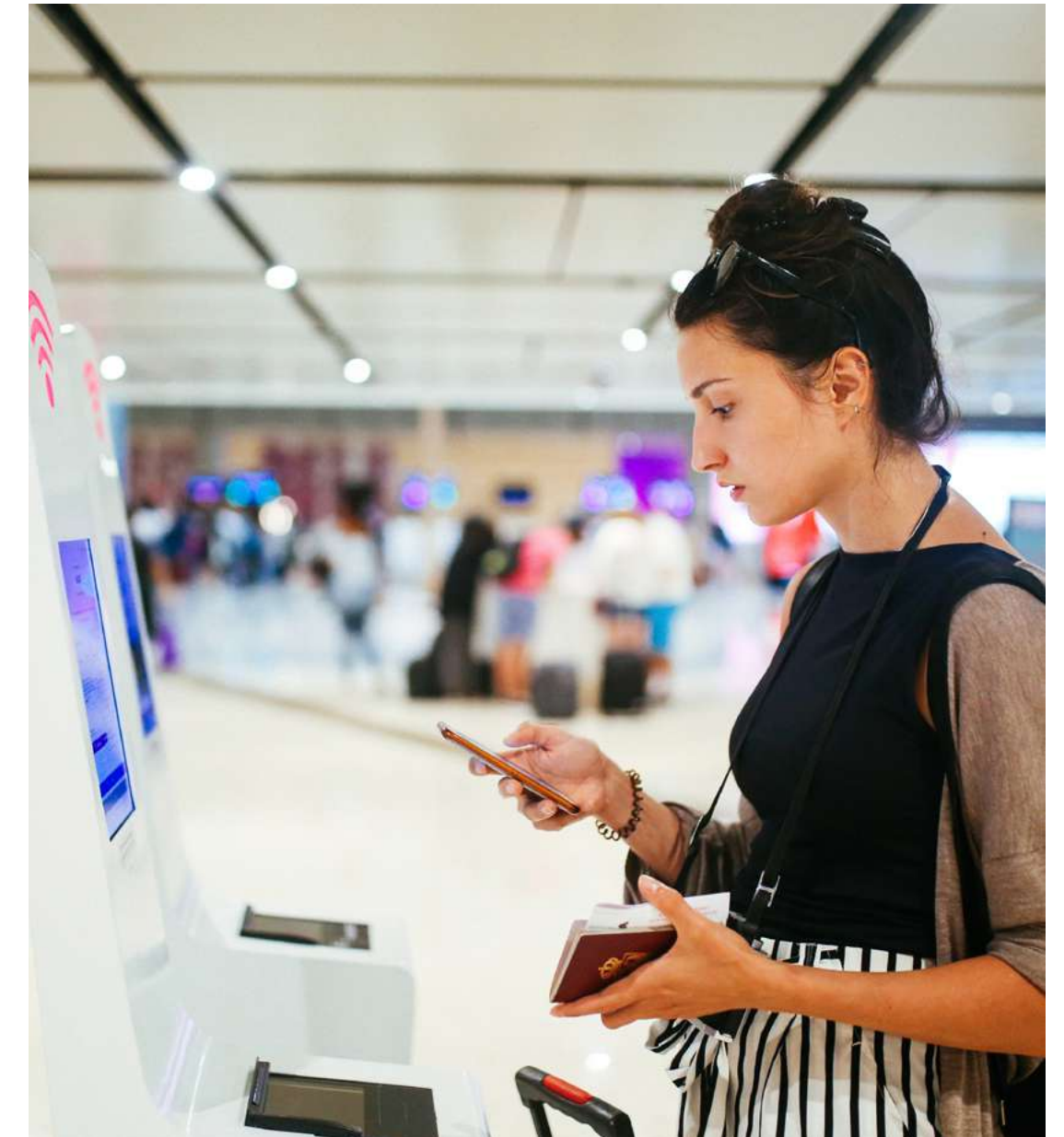
quickly and clearly, this has the potential to significantly de-escalate a stressful situation.

The adage that you only notice when something goes wrong applies to the baggage aspect of travel – it's successful most of the time (99.57%), but when a bag doesn't turn up it has a significant impact on your trip. In reducing the potential for loss, the percentage of successfully delivered luggage will increase, while the speed of resolution will also improve.

When factoring the ability to reduce crime also, it's clear to see how some of the most transformative technologies we're witnessing today are changing the game when it comes to the four billion bags winging their way around the globe each year.

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The disruption experience

A true time of need

In the first section of the report we talked about managing disruption from an industry and technology perspective. Here, we look at it through the lens of traveler experience.

Given the nature of any journey – be it leisure or business – the potential for disruption is a source of anxiety for many travelers. Amadeus' own research identified flight delays, cancellations or airport closure based on unforeseen circumstances (such as weather events) as one of the biggest sources of anxiety for leisure (27%) and business travelers (26%) alike.

27%

Leisure travelers

26%
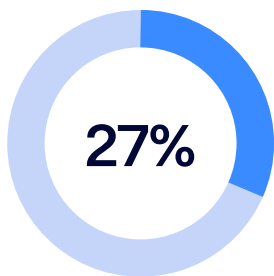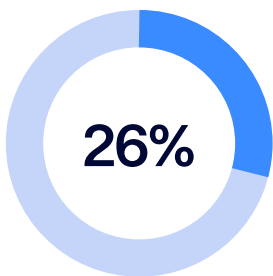
Business travelers

However, effectively managing such disruption for the traveler can be boiled down to three core tenets:

1. **Reassurance: removing the unknown and giving confidence for a resolution through information sharing**

2. **Insight: knowing what this resolution (or an alternative) might be**

3. **Action: knowing when this resolution might take place**

Action as a loyalty-driver

Importantly, successfully solving the issues caused by disruption can become a loyalty driver when it comes to circumstances outside the control of the relevant operator, be it the airline, airport, or travel agent. It's a key marker of the importance of putting the customer experience first.

When asked about the impact of how an organisation handles disruption, three quarters (75%) of travelers said they could see the true quality of a provider in such an instance. In fact, 74% would likely book again if their provider handled the disruption well by offering proactive solutions (which could include next available flight rebooking, overnight accommodation, ground transfers, or food and beverage vouchers), and 72% say they can forgive their provider if they can see they are doing their best to help.

75%

Could see the true quality of a provider in such an instance

74%

Would likely book again if their provider handled the disruption well by offering proactive solutions

72%

Can forgive their provider if they can see they are doing their best to help

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The importance of communication

The unknowns and 'what ifs?' during disruption are primary drivers behind anxiety – a combination which must be resolved (as much as is possible in the circumstances) through reassurance. This might be the resolution of the problem, or it can simply be an update that the fix is being investigated. When it comes to reassurance, one thing is key: communication. Travelers need to know what's happening so they can understand how long to wait or arrange alternative plans with the support of the operator.

Amadeus has partnered with 15below since 2019, with more than 30 airlines worldwide supported by automated, personalized passenger (and airline or airport staff) communications ensuring the passenger is always in the loop. Innovation priorities are building on this through looking at adaptable, scalable solutions for disruption management through airline integration systems.

"By prioritizing real-time communication and being proactive with their service recovery, airlines are able to reassure their passengers, empower them throughout their journey, and build loyalty at a time when passenger trust is harder to earn than ever."
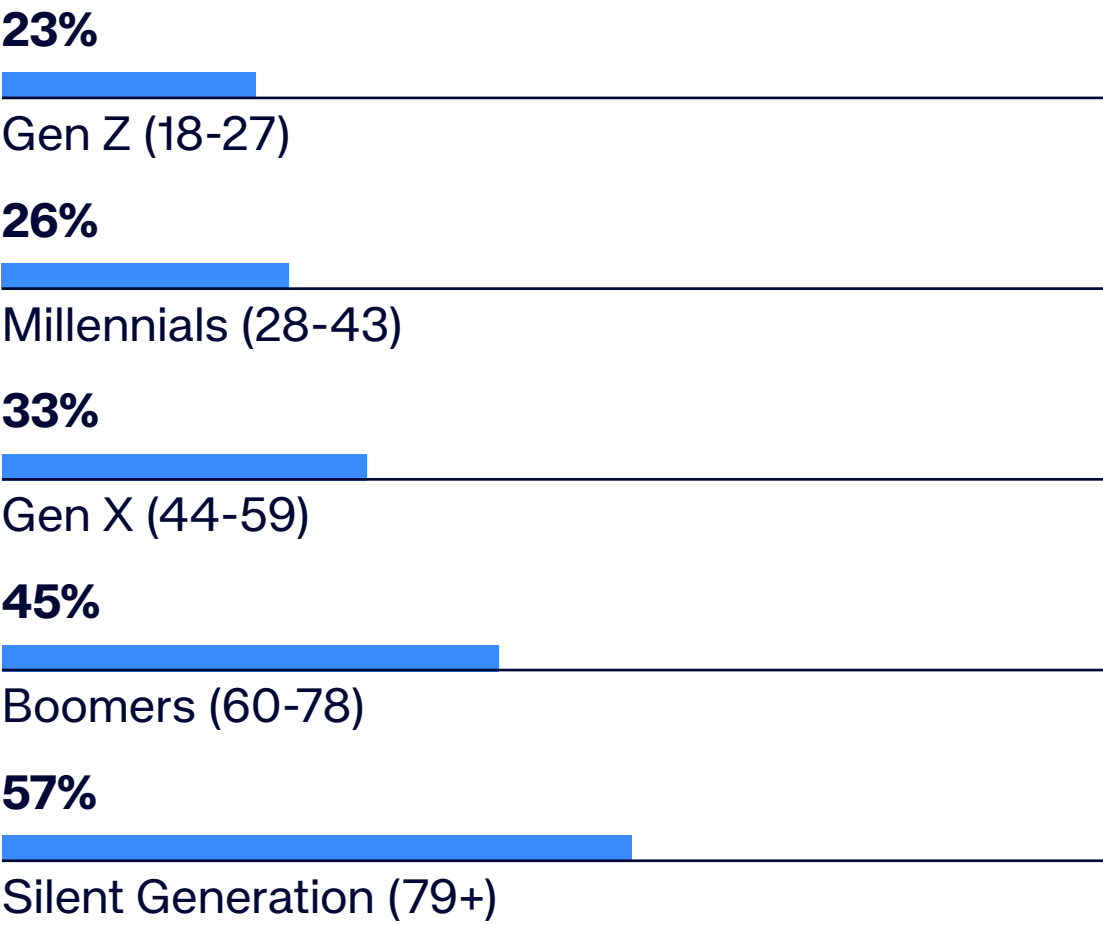
Mathieu Beynel
Product Manager for Disruption Management,
Amadeus

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The need for empathy

The need for empathy is undoubtedly heightened during disruption and this is where the travel and hospitality industries must recognize the importance of delivering support to suit different preferences. While the use of chatbots and AI agents has become standardized in many customer service realms, during disruption a sizeable number of passengers still prefer to speak to a real human. Indeed, in an Amadeus survey, the human touch came out top at 29% in terms of what travelers would want most to feel reassured during travel disruption.

This has an interesting dynamic however when it comes to demographic and age groups – with older passengers significantly more demanding. Indeed, the percentage of those wanting to speak to a human agent correlates directly with age – the older the traveler or guest, the higher the appetite:

23%

Gen Z (18-27)

26%

Millennials (28-43)

33%

Gen X (44-59)

45%

Boomers (60-78)

57%

Silent Generation (79+)

This is a clear example of where the industry needs to meet the traveler on the latter's terms depending on the situation.

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Building trust in AI solutions

Demand for a 'hybrid' approach to customer support, as it were, will always exist. It's human nature to want to talk to someone in person. But huge opportunities exist on the agentic side around resolution where scenarios can be played out across multiple AI solutions to manage (and resolve) disruptions sooner.

It is worth mentioning that AI support is still fairly nascent, so personal preferences are naturally going to change based on customer experiences of its use and application over time. Beyond early adopters, much of the public are relatively neophobic when it comes to new technology – especially where sensitive data is concerned, or where it significantly differs from trusted, known solutions.

The travel and hospitality industries have arguably seen the same with biometrics. At first people were skeptical, but smartphones gave us the convenience of unlocking devices and confirming payments just by looking at them using fingerprint and facial biometric data. This then becomes a door opener to using this same technology in other areas of life.

Enhancing support through AI

In the case of disruption to flights, we envisage that AI support would be three-fold (and more use cases are likely to develop as operational experience using these solutions grow):

Cumulatively, the experience must echo the advances seen in other industries when it comes to what the customer expects from service providers. And the increased use of AI will see time freed up for in-person support for those travelers who need it.

1. Anticipate any upcoming disruptions based on real-time and multi-source data (an improvement over traditionally reactive and often siloed responses using the different impacted systems).

2. Orchestrate and engage with the various personnel involved in the recovery decision-making process (including the crew, maintenance teams, airport slot assigners, etc.) to provide a fast, robust and comprehensive solution that will address customer needs.

3. From the traveler perspective, AI could propose a solution that is more likely to suit the individual passenger's needs and preferences (a more personalized response), which gets the passenger's travel back on track.

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"Technology solutions need to evolve alongside changing traveler expectations. We've been progressing a lot in operational notifications, with the ultimate goal being to meet the changing needs of customers and extend notification capabilities to the wider travel ecosystem."

Mathieu Beynel
Product Manager for Disruption Management, Amadeus

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The themes of reassurance, insight, and action are shown clearly in the results of Amadeus research into traveler priorities and anxieties.

→

Resolving issues quickly

No-one likes being left in limbo, so it's crucial that as soon as a resolution is in place, the traveler is made aware of it immediately and can make a decision on whether to move ahead with it. This involves passengers receiving a notification direct to their app or mobile device that explains the airline's or travel seller's recommended alternative travel option, with the ability to accept or reject it digitally from their device – or even be able to edit the recommendation to match their specific needs.

Recovery options will factor in the entire journey leading to better outcomes for travelers while ensuring the needs of each passenger and their entitlements are understood across partner airlines and other suppliers. This model also means that the individual feels empowered despite things not going as planned - something which can add further reassurance as the situation gets resolved.

At the end of the day, the unknown is a core factor in anxieties being heightened - but building processes and systems that adopt a fully integrated approach throughout the travel ecosystem, means not only can every part of the system work together to resolve the issue, but they can drive positive reputation for handling disruption. Through implementing the right technology solutions to identifying how to resolve an issue, alongside the means to keep the traveler in the loop, anxieties are lessened.

During a travel disruption when travelling abroad for leisure, which of the following could a travel provider do to help you feel most reassured?
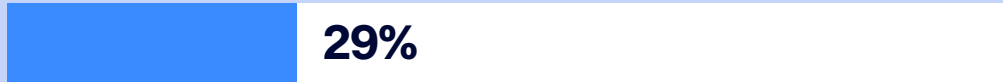
29%
Being able to speak to a human assistant

27%
Help with quickly rebooking or rearranging travel plans

25%
Ability to manage disruption myself (for instance, using a travel provider's app to rebook available options without the need to queue at the airport or speak to a call center)

25%
Compensation or vouchers offered proactively
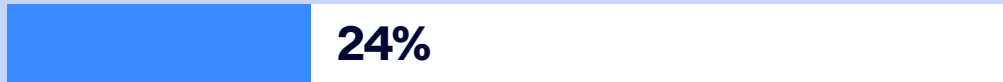
24%
Clear, regular updates on the situation through email or the travel provider's app

24%
Assistance with arranging alternative transport or accommodation

23%
Access to a comfortable waiting area or lounge

19%
Complimentary drinks and snacks

19%
Ability to take control and review options and rebook flights using an app

18%
Clear reminders of their claims and refund policy

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The hotel experience

The subjective booking experience

There are (and always have been) a variety of core factors which inform travelers' decisions when it comes to choosing a hotel.

There is the 'hard', fixed factor in terms of location – is it close to amenities, venues and the experiences that are the reasons for travel? Are tourist attractions within easy reach? What are transport links like? And for business travelers, is the meeting or conference venue easily accessible?

Price (and here we're talking about cost), is also relatively 'hard' in terms of it being an objective aspect of a booking. Its importance in the overall travel planning process is reflected in it being the biggest priority to get right for travelers (29% of respondents in research commissioned for this report, cited finding the best deal as the top challenge – above 28% finding the best travel timings and 26% ensuring they have the right paperwork and health records for a trip).

29%
Finding the best deal as the top challenge

28%
Finding the best travel timings

26%
Ensuring they have the right paperwork and health records for a trip
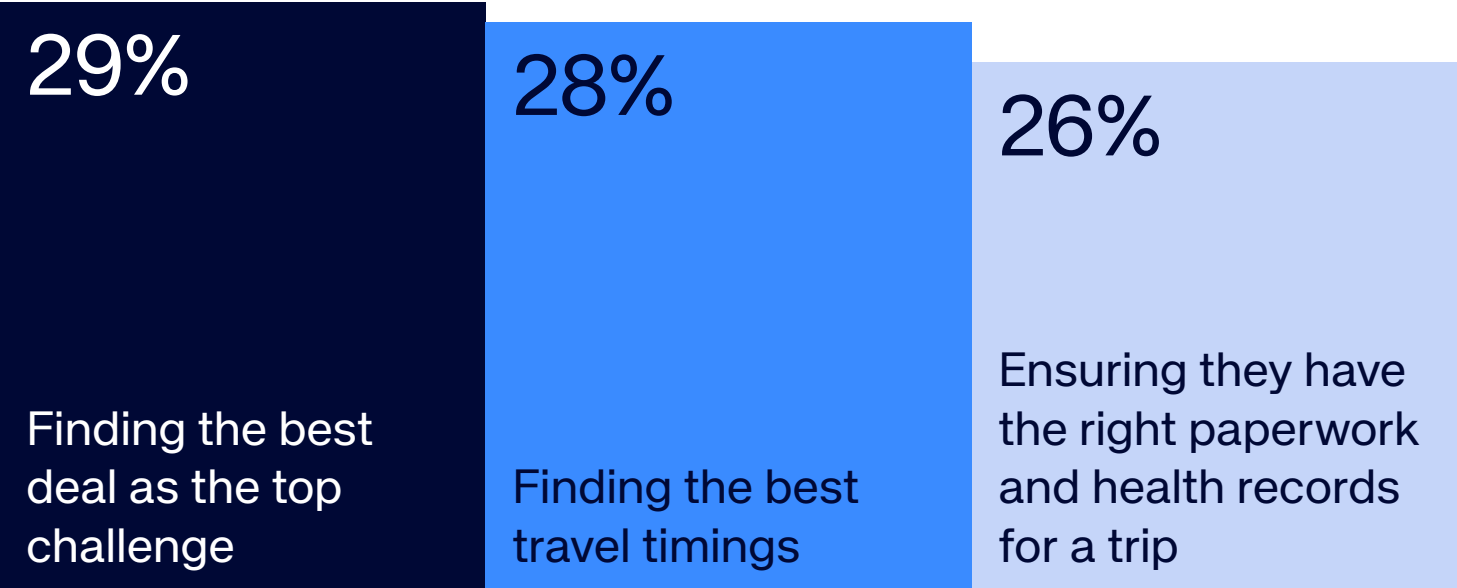
A business traveler may simply want somewhere to put their head down prior to a meeting, whereas a family may need a week's base without breaking the bank. Every demographic has a different budget for a different purpose.

Finally, there are benefits and add-ons. A spa; swimming pool; on-site gym; restaurant; workspaces; communal areas for meetups, family areas – all are 'fixed' in terms of being present or not.

So, while these all inform decisions, they're not subjective influences, and when we look at the more emotive needs of travelers we must look at the softer side of hospitality. This is where true personalization becomes the secret to success.

Me, me, me

Ultimately, guests want the experience that matches their hopes and aspirations for the stay. This means that, as well as delivering on the practical, hotels must increasingly focus on the emotional needs of guests to stand out.

If we look at the current norm, guests can book a certain room type with standardized facilities. Essentially this is down to the size and number of beds – taking aside the suite option – and where possible a choice of view.

It's relatively formulaic and constricted, and historically, there's rarely the option to book a room with specific facilities apart from a category (e.g. executive room with a tea and coffee maker). And if hoteliers only allow fixed options, then we're not looking at all the routes to fulfilling guests' hopes and delivering an experience.

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Personalization through attribute-based selling

When it comes to differentiation (and the brand loyalty it brings), we fundamentally have to look at true personalization. This demands a shift to attribution-based selling experiences, as demonstrated by recent research from Amadeus ↗ which found that 63% of global travelers are willing to pay significant sums for room attributes on top of their standard average daily rates.

63%
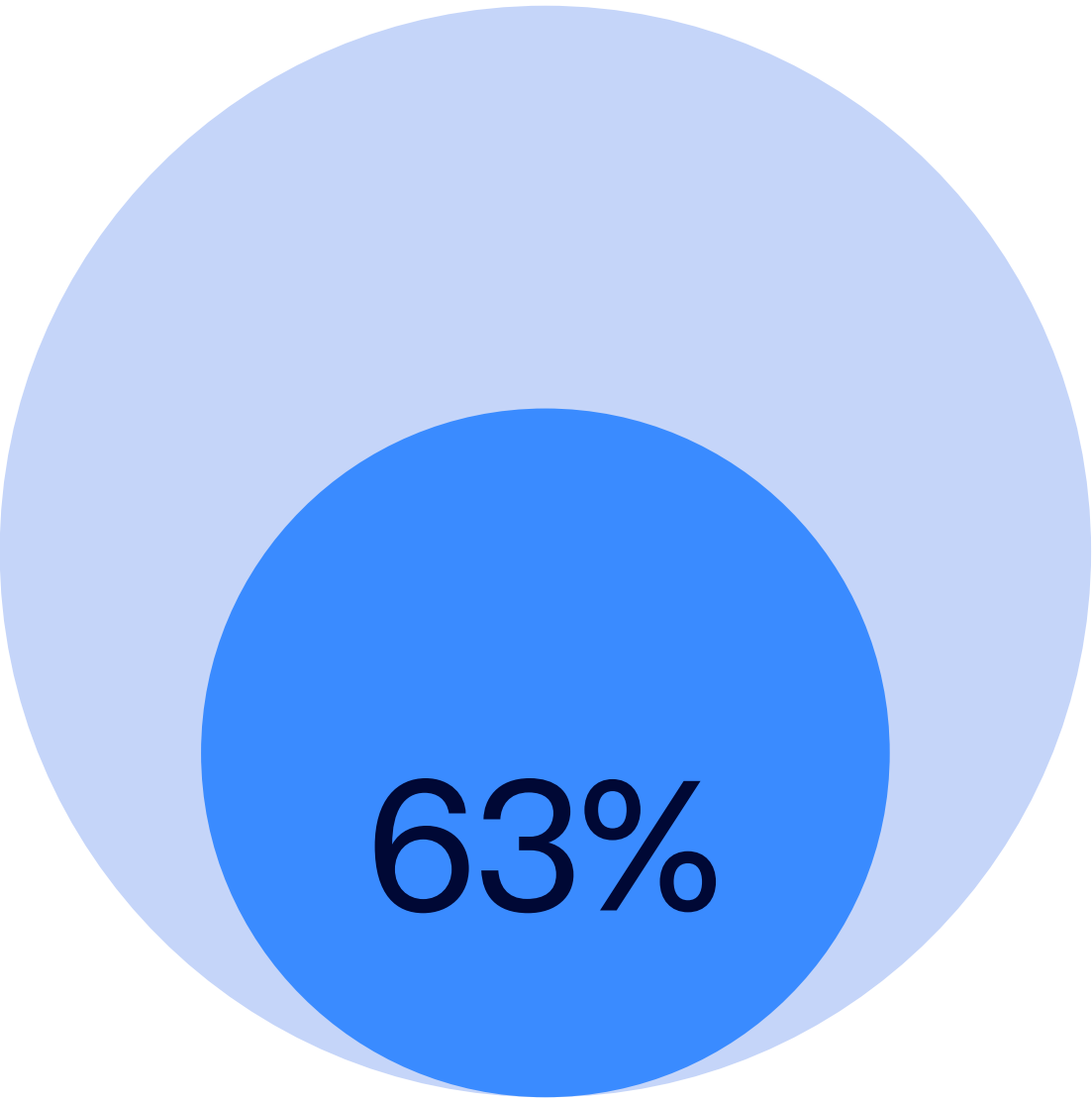
of global travelers are willing to pay significant sums for room attributes.

"When you go onto a website, travelers want to be able to say, 'I want a room with a bath, with a view, that's near the lift, and has a king bed' and the booking system will create that offering for you.

"Sometimes it's the simple things which prove the need best. My husband is over 6 feet tall for example, so there is no way he's sleeping in a queen-size bed. He just doesn't fit, his feet hang over at about his knee, but try confirming a king bed during a booking. It's not happening unless you go to a five-star hotel and even then, they might call it a double, when it's a queen and not a king."

Maria Taylor

Senior Vice President of Marketing, Partnerships & Commercial Operations, Hospitality, Amadeus

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Paying for extras

Importantly, personalization can be transitional – simply adding options can be a natural first step to building more accurate data-based personas and guest records.

Hotels need not see the opportunity as binary. The shift from persona-based profiling to a hyper-personalized, attribution-based, and ultimately guest-centric one is big, but a tailored approach can be adopted and rolled-out gradually. The same research demonstrated this clearly:

17%

of business travelers from the U.S. say they would be prepared to pay up to 20% more to have business services like printing as part of their room package.

12%

of Gen Z (18–27-year-olds) say they would pay up to 25% more on top of their room rate to have an Xbox or premium TV channels.

If we look at the cost of an Xbox, this 25% increase could repay itself within just a few bookings, an incredible return on the investment. (This goes beyond the gamer. If you're a parent away with your teenager, knowing they can keep themselves busy and not complain about being bored is worth the additional room fee.)

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Making the move from PMS to CRS

Critical to the success of attribute-based selling is the shift from a data-siloed PMS system to a more connected solution, which is where the Central Reservation System (CRS) comes to the fore. This acts a single source of truth, bringing data and insight from a variety of channels to give a single view of the customer and operations alike, and to ensure that the ability to tailor individual stays can become a reality.

Customer-centric PMS technology is in its relative infancy however, although this should simply be an imperative to act sooner rather than later. Better to be an early adopter than customer-chasing laggard, and Amadeus is already working with many PMS companies to pioneer such solutions.

Initial deployments of attribute-based selling are already happening with some large-scale hotel chains ↗ on board for this transformative technology ↗, and once this widens out it will start to become a guest differentiator ↗. Importantly, this needs to be a consideration for OTAs as well – hospitality brands will take the march through hyper-personalization and potentially own the customer if the approach isn't adopted at a wider scale.

A two-way street

The personalization opportunity in hospitality champions a view on the customer that hasn't previously been possible and yet is one which can underpin longer-term adaptation and evolution to match guest demand.

In knowing – through search and booking data, as well as post-stay insight – the changes that modern guests want from their experience, hotels can start to upsell more offers and services. This becomes a significant customer convenience aspect of any stay – something key to driving loyalty and brand preference.

Data provides this window into expectations but if personalized booking options are limited, then hotels can't know what customers want if they don't see what's actually in demand. Limitations in choice bring limitations in customer insight.

"As attribute-based selling rolls out, hoteliers will start changing their physical offerings based on how many people are selecting which attributes. It's very hard to tell with traditional room type selling what customers actually want, because you don't find out about it. So, it will give the hoteliers a lot more information about what the customers value and what a customer looks for in a resort is very different than what they want in a city hotel."

Maria Taylor

Senior Vice President of Marketing, Partnerships & Commercial Operations, Hospitality, Amadeus

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Explore to expand

In order to keep innovating and differentiating the guest's stay, hotels can explore add-ons and additional services as proof of concepts. This can be done without expensive leaps of faith – taking a beta-test approach to new initiatives can become a major driver of commercial growth.

Under this model, hotels can offer a benefit or bespoke booking preference in a handful of rooms within a property and if the uptake is strong, they can start to roll it out wider without undue risk.

This is how it's possible to see the hospitality industry truly transforming as it builds out the options hotels can offer which, in turn, deliver more insight into specific guest hopes and expectations. If parents book children into onsite kids' clubs (while they enjoy the spa), then bundling these into a package becomes a differentiating benefit.

Imagine your own recent business trip and what you may have asked reception for support with – a taxi booking for example to HQ or a customer's office – or you made the request when you went down to breakfast. Now consider that the next time you book that property, you have a table reserved during your regular breakfast slot and an email from reception ahead of your visit asking when you'd like them to book a cab.

It can also become an upsell in the event of a change to a guest's travel plans. If the destination is aware of a flight delay for their guests, then it can offer these perks free of charge when they arrive or give them a voucher for a dinner or spa trip. The insight gleaned from attribute-based selling means that benefits become more than simply value-add, they become points of differentiation.

Winning the battle for share of wallet

Understanding the guest demands a data-first approach, with attribution-based selling among the first steps in making such personalization a reality. The importance of this can't be overstated – return bookings (and the associated word-of-mouth recommendation) are the lifeblood of any hotel.

The move from objective, functional booking to fulfilling hopes through more subjective, emotive experiences is a big opportunity for the hospitality industry. The details may seem in isolation, relatively minor, but once laddered up to the macro demographic level and individual guest habit, they can become significant sources of growth and loyalty.

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The loyalty experience

The power of feeling valued

Central to loyalty is satisfying the personal need to feel understood, appreciated and – ultimately – valued. If you think of the relationships you have with your own favorite brands, the strongest are likely to be those which know you and what you like and, importantly, demonstrate that through smart, targeted promotions.

Conversely, brands with which you've had a fleeting interaction, but which spam you with irrelevant offers rapidly become an irritation – reputational damage it's hard to claw back from.

The psychological aspects of loyalty are only one side of the coin of course. Loyalty is nothing without the 'what's in it for me?' aspect of a brand relationship. Money off, special offers, exclusive access – something which brings a tangible return increases the affection held for a brand. It's part of human nature to want something in return for loyalty.

"Accenture's own research, Consumer Pulse Survey 2025 ↗, says 86% of travelers now want to shape their own experiences, with 93% of active gen AI users saying this is important to the personal connection they feel with the brand. With AI agents now in the mix, the industry can further assist travelers by reducing the time and effort required to scour for the best options and prices. These AI agents can monitor price changes in real time, integrate loyalty points, and offer assistance when plans change, even to the point of making or changing bookings."

Emily Weiss

Senior Managing Director – Global Industry Sector Lead, Travel, Accenture

> accenture

Proof is in the data

The evidence of the power of loyalty is clear when we look at the data from Amadeus traveler research in 2025. Nearly two fifths (38%) of global respondents admit that subscribing to loyalty programs encouraged them to book activities/experiences offered by the scheme outside of their primary need when traveling abroad.

A similar proportion (37%) agreed that being part of a loyalty program encouraged them to travel for leisure more frequently – although there were interesting market dynamics involved, with Indian travelers ranking highest at 47% agreeing and Singapore just behind at 44%. This compares to 38% in the US, 34% Spain, 32% China, with the French and UK markets significantly lower at just 27% and 26% respectively.

47%	44%	38%	34%	32%	27%	26%
India	Singapore	US	Spain	China	French	UK

38%

admit that loyalty programs encouraged them to book activities/experiences offered by the scheme

37%

agreed that being part of a loyalty program encouraged them to travel for leisure more frequently
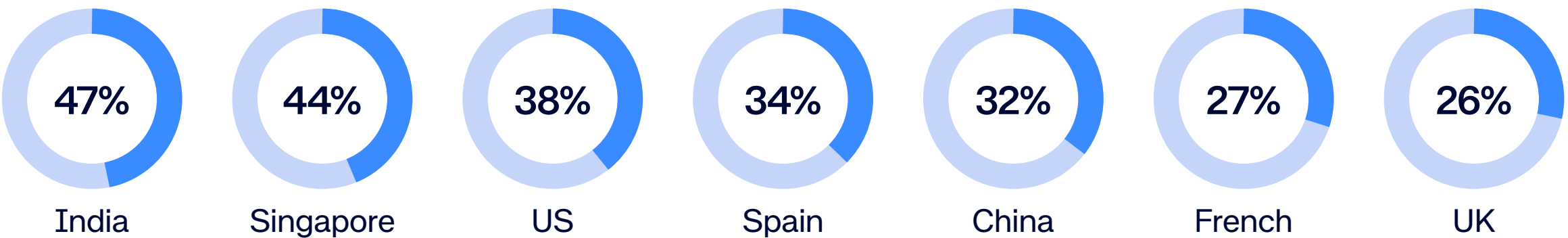
Cultural differences are clearly key, and for international operators it's essential that such nuances are understood; there's no such thing as the 'standard global traveler.'

This doesn't just apply to leisure: business travelers also want specific returns for their loyalty. Key expected benefits understandably include speed and prioritization. Of those surveyed, 32% expect priority boarding and/or check-in; 31% want both priority customer assistance if difficulties are encountered and fast-track security lanes.

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AI at the core

Central to the success of personalization is the sophistication of analytics and subsequent understanding of an individual traveler. There's naturally a tension here when compared to other industries – global retail giants experience more frequent interactions with their customers and so are able to build a more granular profile of each of them. Understandably, individuals don't tend to travel as often as they make online purchases. As a result, there's a need to make the most out of the data you do have and to tailor it accordingly.

Amadeus has partnered with Adobe for nearly twenty years, working together to pioneer cloud-native AI-powered personalization via the 'Traveler DNA' solution. Linked to the Adobe Experience Platform, this enables airlines to segment members by loyalty tier, purchase history, and intent—automating personalized loyalty offers, upsells, and re-engagement across channels.

"Let's say you're an airline and you have one customer who is a frequent business traveler, they never check a bag, but they love pre-selecting their meal. It wouldn't make sense to push them through the same marketing or booking flow as a family with two kids, several bags, and an interest in booking in-destination content like a rental car or family activities. Hyper-personalization allows travel marketers to segment their customers in an easy-to-use online platform so they can better target their advertising and tweak their booking flow to match travelers' personal interests and expectations."

Jose Garrido
Retail and Travel Lead,
Adobe

Adobe

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> "By coming together to enhance the traveler experience, we can develop tailored solutions that meet evolving traveler needs and preferences, fostering loyalty and driving repeat business.
>
> "Through working together in this way, the Amadeus partner ecosystem helps us create a better-connected travel industry. We can foster innovation in search of an improved traveler experience, while an enhanced partner ecosystem can significantly develop the traveler journey, from booking right through to post-trip."

Simon Akeroyd
Vice President,
Strategic Projects and Alliances,
Amadeus

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Strength through partnerships

'Traveler DNA' is a prime example of the power the travel and hospitality networks can drive through collective insight. Instead of sitting in siloes, customer data (with the appropriate permissions) can be shared to build increasingly accurate profiles of the traveler.

Tapping into external customer data

The benefits of partnerships demand an extension beyond the travel and hospitality industries. Through integrating retail brands into loyalty schemes, the understanding of each customer can be increased, adding more data into the pool to be analyzed and strengthening relationships.

Airline customer loyalty programs have long been pioneers here, with partnerships including Uber, IHG and other global megabrands. Travel insights can inform such strategic partnerships and investment decisions – if a hotel chain is opening up a new destination near a skiing hotspot, then partnering with appropriate clothing and equipment brands can provide a highly focused, persona-centric proposition that can stand out from the competition.

Loyalty in the pocket

The advent of digital wallets must be considered another route into driving loyalty. As the 'connected trip' model becomes a reality, a unified profile can store multiple program points and currencies, allowing for conversion across brands dynamically. Through activating promotions, a positive feedback loop is created.

The very nature of digital wallets means that highly targeted, dynamic offers can be made in real-time once in the airport. Geofencing and location data can push time-limited duty-free offers to passengers when airside, for example, aligned to their destination or holiday type, or simply in line with insight from other retail brands and purchase history.

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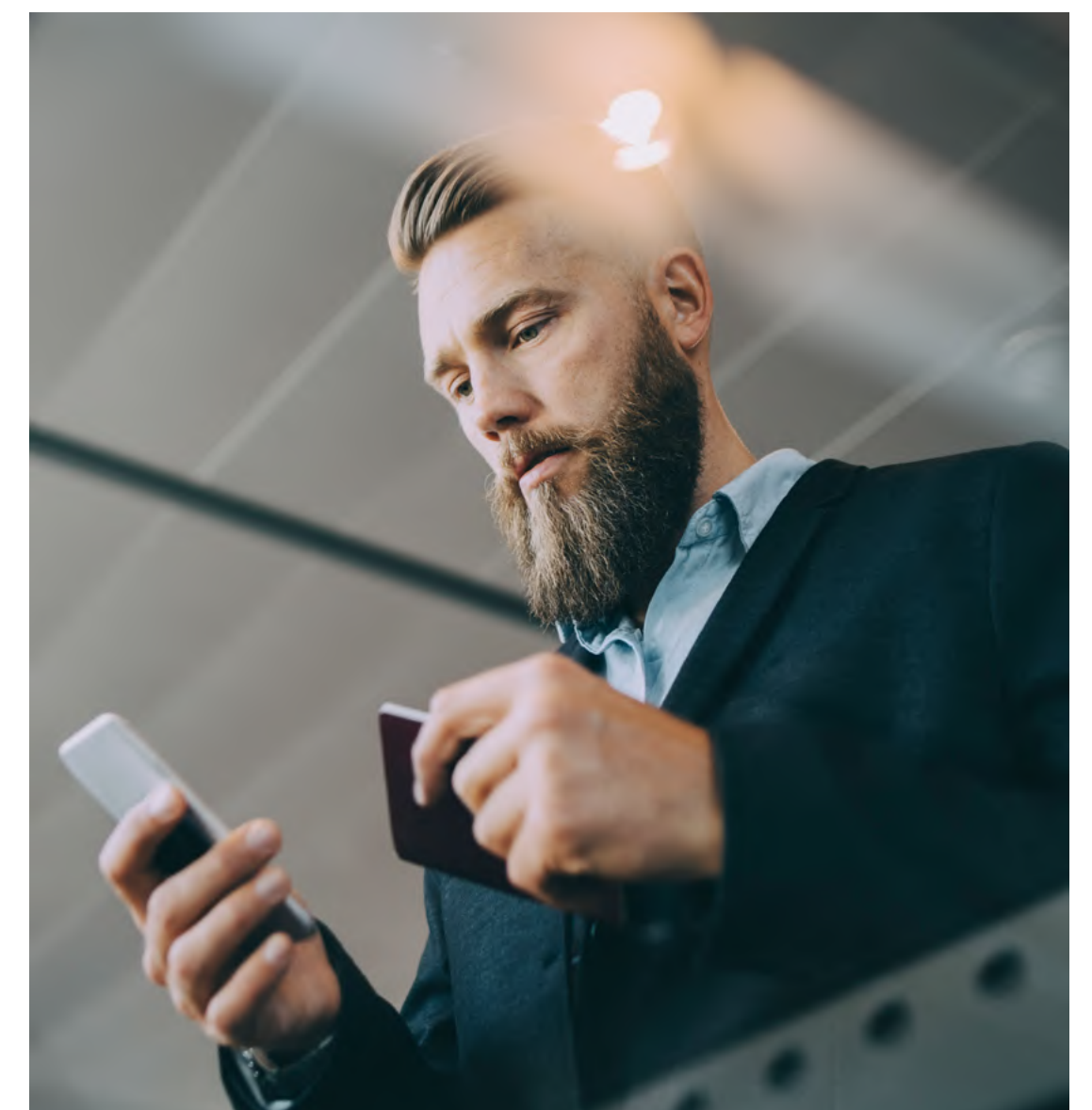
Sustainability as a loyalty driver

Increasing awareness of the environmental impact of travel alongside public desire to bring their carbon footprint down can become a loyalty driver when handled smartly. This can be through pushing targeted trips with lower emissions and rewarding acceptance accordingly. For the eco-conscious traveler, having a sustainability concierge is likely to be well received, especially if there's something in return.

This can be built on further, with loyalty tiers aligned to a passenger's carbon footprint, for example, allowing premium or exclusive access. At a corporate level, this brings the potential for impact, with regulations increasingly looking at reduction, rather than offsetting, to comply with sustainability targets.

Ultimately, people want something in return for their repeat custom. But it demands an understanding of the traveler to be effective – be it based on owned and third-party data, or through highly focused persona creation. Establishing loyalty and repeat business is the foundation of a successful operation, and the power of the travel and hospitality network has to be harnessed for everyone to benefit.

36% **of global respondents confirm that subscribing to loyalty programs has encouraged them to upgrade to a more premium service or experience in the past** – although appetite varies significantly across markets.

The importance of knowing your local customer is key!

China	India	US	Singapore	UK	Spain	France
53%	46%	34%	28%	27%	23%	19%
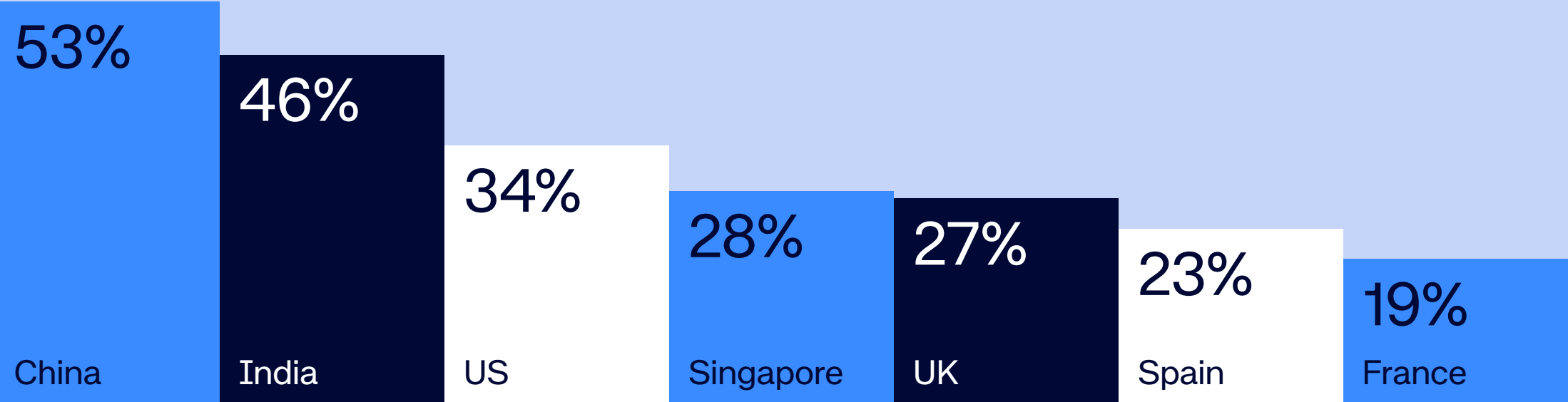
More than a third (35%) of global respondents – with a relatively consistent level across markets – admit that **subscribing to a loyalty programme means they tend to book with one particular operator. This is true for:**

39%
Hotel loyalty programmes

38%
Frequent flyer programmes

43%
Car rental loyalty schemes

38%
Travel credit card rewards

40%
Airport lounge memberships

42%
Tour operator rewards

39%
Online travel agency loyalty programmes

42%
Travel insurance loyalty discount

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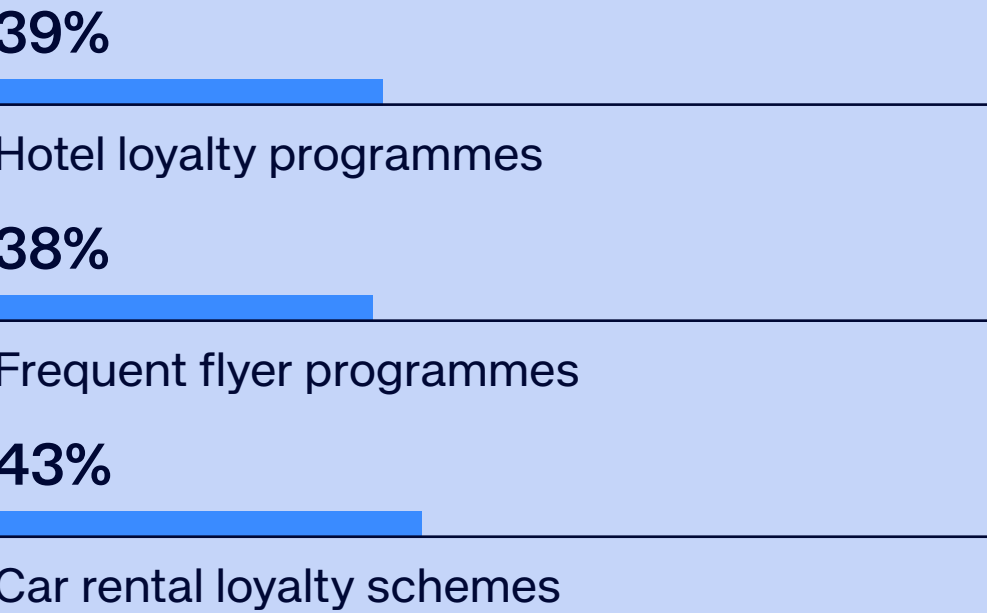
The payments experience
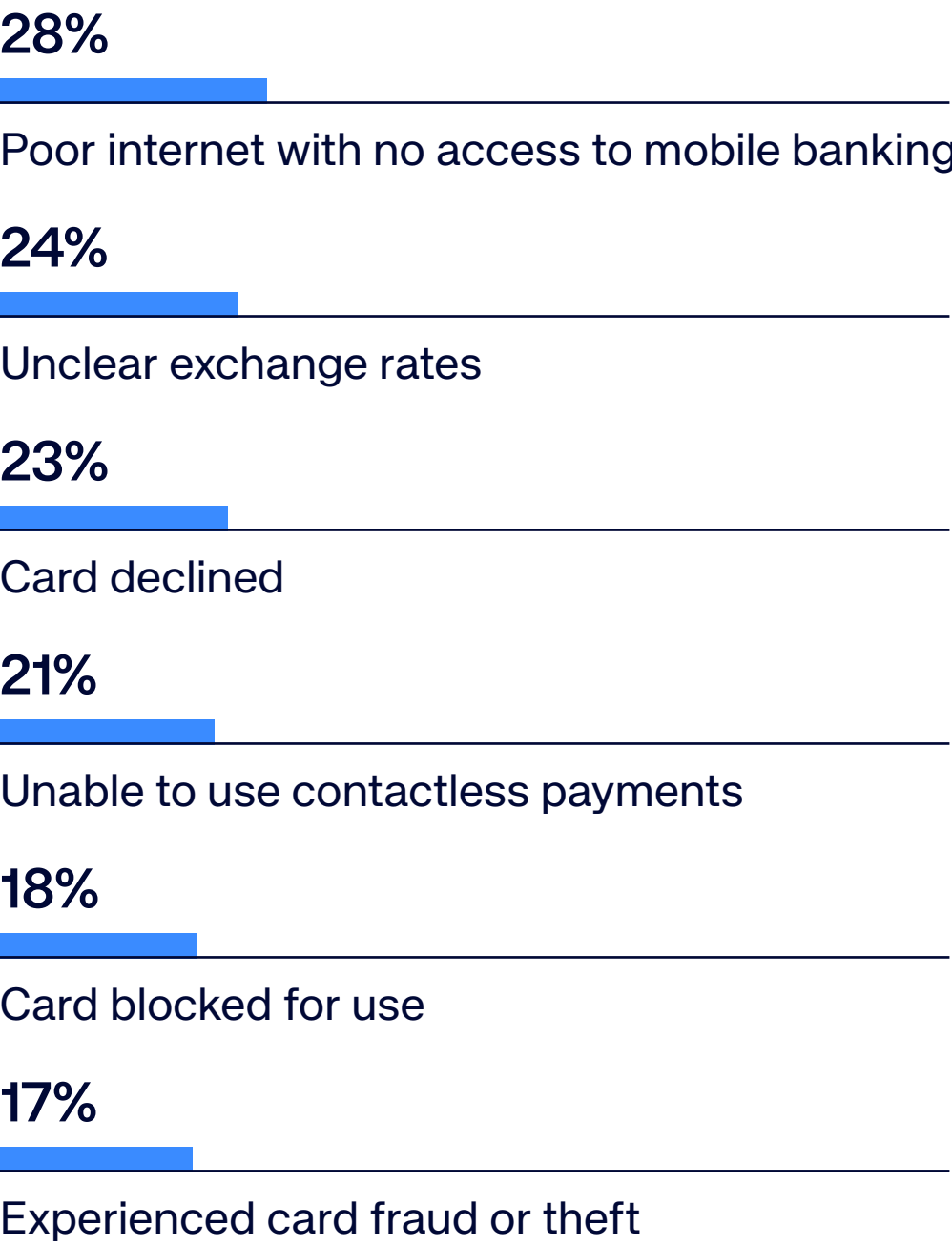
A seamless catalyst to travel

Payments solutions are, fundamentally, integral to the entire travel experience. It's obvious, but without the ability to take money – from online booking through to a credit card deposit for any extras incurred during a hotel stay – nothing can take place. Journeys don't exist.

But we often take payment for granted without truly realizing its role as a catalyst to making travel happen, for everyone, not least because for most of the time it's seamless and unintrusive.

This ease of use is key. Travelers need reassurance that their monies have gone through safely, and securely – a payment is convenient when you only enter your details once. This sentiment was echoed in recent Amadeus research for this report with over a fifth (21%) citing that ensuring the payment goes through smoothly is something they worry about when booking a leisure trip abroad.

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Modern retailing

Airlines are adopting new standards and technology for Offers and Orders that are akin to those used by digital retailers such as Amazon. Offers will include dynamically packaged and intelligently priced product bundles that are more attractive to travelers, making choice simpler and opening up new possibilities through being served a variety of relevant options.

Rather than receiving a ticket plus several EMDs (Electronic Miscellaneous Documents) for ancillary services in a booking, an order will provide a single source of all purchases. This gradual transformation of airline technology will simplify the traveler experience while allowing for personalized retailing.

Essentially, the work being done by Outpayce alongside payments partners is bringing the retailing experience travelers have grown to expect from other industries to travel and tourism. This is key when we consider the ultimate ambition of the 'connected trip' or single button purchase model for travel, and how personalization will work in practice, rather than theory.

Top five challenges for travelers when making payments abroad:

28%
Poor internet with no access to mobile banking

24%
Unclear exchange rates

23%
Card declined

21%
Unable to use contactless payments

18%
Card blocked for use

17%
Experienced card fraud or theft

Technology infrastructure

When looking at payment solutions, we need go no further than Outpayce, a financial technology specialist owned by Amadeus, bringing together travel and fintech expertise. It's the open API infrastructure upon which payments happen in the travel space, streamlining foreign exchange, fraud management, chargebacks, and in-person airport/mobile payments.

These solutions underpin every aspect of travel and open doors beyond just handling money and making transactions simpler throughout a journey (this can't be underestimated, however). It's allowing for the evolution of modern travel retail and creating new revenue solutions through loyalty applications and integration with industries outside of travel and hospitality.

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Profiling versus personalization

By pricing and packaging air and non-air products and selling them consistently across all channels, the industry can ensure the right offers are targeted appropriately to travelers at the right time in the purchase process.

What this tackles is the imbalance between the data held on a specific individual and the ability to parse this data into a truly personalized experience. We can't ignore the fact that if we bring back the Amazon analogy, frequent customers have dozens of shopping transactions a year through the platform. Yet these numbers don't translate to travel - purchasing holidays are nowhere near as frequent.

By bringing together data on the traveler throughout the journey, combined with payments data, the ability exists to create detailed pen-portraits of a customer, target them accordingly, and ensure each transaction can be routed in the most appropriate way. And, of course, where there is a specific search made, future targeting can be adjusted. But the single-customer view the travel and hospitality sectors can lay claim to will always be less granular than the consumer retail equivalent.

"With the increasingly sophisticated AI solutions we're adopting and deploying, the ability to refine personalization will ultimately improve. But we can't ignore the fact that we don't have the scale of data points per customer that major retailers have and there's always going to be some personification necessary."

Suzanna Chiu
Head of Amadeus Ventures,
Amadeus

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Expanding into other sectors

Payments solutions are also facilitating expansion beyond the travel sector, through integration with financial services and retail industries. Cultural and socioeconomic change can be a major driver behind such opportunities, alongside shifting consumer behaviors and comfort levels in sharing personal data and information.

As an example, we need only look toward Agoda, where it has taken advantage of the boom in India in alternative and online payments. Previously low-level, India now has one of the biggest markets for such services in the world.

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App-driven loyalty

The API-driven ability to integrate mobile apps truly enhances the traveler experience and can be a gateway to increasing revenue and driving loyalty. This can apply to every company throughout the travel and hospitality industries, from hotels looking to offer last minute upgrades to airlines looking to fill flights and upsell premium seats.

As an example, let's consider a traveler arriving at the airport early for their flight. An interconnected, open, agile technology framework understands this because the passenger consented to share their location through the airline's app.

This then informs the offer system of the passenger's early arrival by sending an 'event', which then draws on a detailed profile of the traveler. In this instance, it could be a business traveler who has arrived early, and so with a real-time view of flight and seat availability the airline sends a 'pop-up' offer to upgrade to business on an earlier flight to the traveler's phone.

The passenger's order would be automatically updated once the customer accepts it and payment is taken. Information about the earlier flight would then be shared with other suppliers involved in the journey – for example the hotel which can proactively offer an early check-in or room upgrade if available sooner (without having to re-enter any payment details).

Payments made easy

There is a plethora of research across industries which shows that when a payment is automated or built into an overall journey, customers are significantly more likely to accept upsells (e.g., better seats), spend more per transaction, and convert at higher rates. For example, research by Outpayce partner Stripe found that 71% of businesses agreed that seamless payments integration has become a competitive advantage due to rising customer expectations. The same report revealed that three-quarters of customers are more likely to complete a purchase when one-click checkout is available. The ability for payments infrastructure to make this so seamless is key to delivering a great experience and driving loyalty through personalization.

Ultimately, the traveler wants the best experience. If, along the way, it can be improved through extra legroom seats, earlier flights, or targeted loyalty rewards, then this can only improve the whole journey.

This starts of course with the booking process through smart, sophisticated dynamic pricing, where the ability to deliver the best options that match the traveler's expectations can ensure that excitement builds from the very start.

When we consider the emotive element of travel, giving the traveler the results they want at the outset starts the process for a frictionless experience. They can get the journey they want and need and, along the way, it can be improved seamlessly and effortlessly. In this regard, payments become far more than simply solutions – it's integral to creating a highly personalized trip.

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"In the evolving landscape of travel, payments are a strategic enabler of seamless, personalized journeys. Whether booking a flight, upgrading a hotel room, or navigating airport services, travelers expect payment to be fast, secure, and invisible.

"Outpayce from Amadeus is at the forefront of this transformation. Our open API platform powers everything from B2B virtual cards and fraud prevention solutions to mobile and in-airport payments, ensuring that transactions are not just processed but optimized for experience. This infrastructure underpins the shift toward modern travel retailing, where dynamic offers and unified orders simplify the journey and unlock new revenue streams.

"As travelers demand more personalization and reassurance, payments become a moment of truth. In our own research, we discovered that over 70% of travelers now choose providers based on secure commerce reputation, the ability to deliver frictionless, trusted transactions is a competitive differentiator. By embedding payments into the core of the connected trip, we're not just enabling travel - we're elevating it."

Sam Abdou
CEO,
Outpayce

outpayce
from aMaDEUS

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The transfer experience

Door-to-door approach

The first and last miles of a traveler journey – home to airport, airport to hotel – can be fraught with worry, with 24% of respondents in our survey identifying the wait for their train, coach or taxi to the airport to arrive as being a point of anxiety. According to an in-depth Amadeus report on mobility ↗ some of the reasons behind this anxiety include unfamiliarity with local currency, language barriers, heightened safety concerns and trip fatigue. Having landed, the urgency with which people want to get to the hotel, dump their bags in their room, and get to the beach or business meeting is high. They've finally arrived.

24% of respondents identify waiting for their train, coach or taxi to the airport to arrive is a point of anxiety
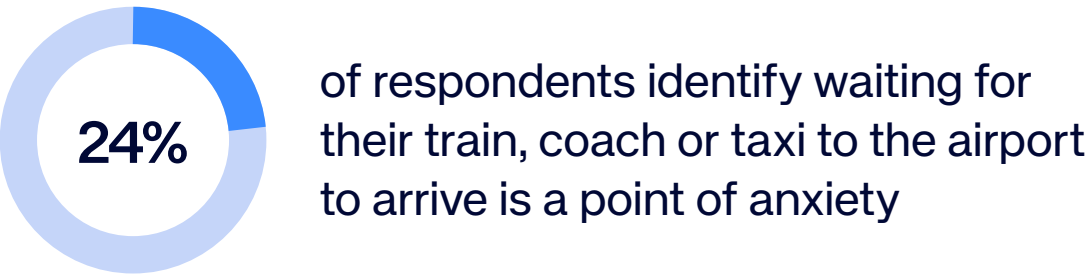
As such, the role of ground transport within the holistic door-to-door approach to travel is as critical as any – be it a taxi, rental car hire, a pre-arranged transfer, or the use of public transport. Integrating such services is nothing new; Amadeus has long-term partnerships with transfer companies and global car hire brands such as Hertz, Enterprise, Avis, Europcar, and Sixt, as well as smaller, local operators.

As part of its broader strategic vision, Amadeus is now also making access to rail express services seamlessly available via its transfer solution. In April this year, Heathrow Express, carrying around 16,000 travelers a day between London's Heathrow Airport and central London, was the first to be implemented. But this is just the beginning. Thanks to a partnership with Distribusion, a global ground transportation distribution company with an impressive portfolio of airport express operators worldwide, Amadeus will continue to integrate more intercity and airport express services as part of the company's ground transfers solution.

Backbone of operations

With these door-to-door services integrated into the Amadeus Travel Platform, the options open up for better service recovery in case of disruption. For example, airlines are not only limited to their own or partner airlines' services, but can offer rebooking of multi-modal journeys using train, taxi, rail and ground transport alternatives to provide the optimal choice for the traveler, taking the stress away from the traveler themselves needing to do so. The goal is that when disruption occurs, passengers can receive a single notification quickly that explains the travel provider's recommended alternative option, with the ability to accept or reject it digitally from their phone. From an emotive perspective, this acts as significant reassurance. It tells the passenger that despite the disruption, everything is under control. It also demonstrates an understanding of each passenger and their needs.

These kinds of solutions also need to take into account entitlements across partner airlines during disruptive events – meaning rebooking or, where necessary, the suggestion of 'multi-modal' options, using rail and ground transport to provide the optimal choice for the traveler.

Next-generation transfers

While transfer booking has previously appeared as a list of options based on offered criteria – budget, duration, model, location – the increasingly sophisticated use of AI is making recommendations proactively and fine-tuning options. This might include only serving options for SUVs to families or electric run-arounds to those on a city break.

In addition to AI-inspired recommendation, having transfer options within an Integrated Mobility App was cited as a very useful addition to the booking process by 66% of respondents to an Amadeus survey. This appetite for a one-stop-shop app that consolidates various mobility services is something the transfer sector needs to respond to. It is an indication of a future trend toward integrated digital solutions that simplify travel planning and execution.

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Supporting environmental goals

Sustainability considerations and goals of both the industry and travelers will also drive the need to display potential carbon impact into the booking options, with the eco-conscious traveler wanting to be in control of their journey's carbon footprint (and reduce it wherever possible). This is particularly important when looking at corporate travel where the need to comply with policies is key – policies which are intrinsically aligned with sustainability goals and compliance demands including emissions reduction.

Growing Electric Vehicle adoption

A prime demand within more sustainable car rental is the use of electric vehicles (EVs), and here we can see another example of how travel booking solutions can share leisure and business traveler trends with third parties to inform their own strategies.

Through demonstrating an increase in EV searches at booking stage, airlines and travel sellers can communicate this demand to car rental operations, demonstrating that the need for investment in EV

fleets is justified. When considering the cost of doing so, having the empirical data to show demand is essential to taking the plunge.

Furthermore, forward-looking booking data can highlight where pockets of demand are high or low, allowing operators to over- or under-index accordingly.

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Closing

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Conclusion

As we've seen throughout this report, the travel and hospitality industries find themselves in potentially game-changing times. Technology is opening doors to create new services and experiences, while also enhancing those which exist already.

Today, leading companies in the sector are striving to deliver on this promise to make every travel experience great by innovating and adopting new technologies to improve choice, security, customer support, and the hyper-personalization that makes memories unforgettable.

The shift to cloud-based solutions is acting as a catalyst to harness the ground-breaking opportunities brought about by AI and biometrics especially. Importantly however, it's allowing all those throughout the travel and hospitality ecosystems to adopt the technologies in their own way – for some, legacy approaches need to be addressed before new solutions can be truly integrated; for others, building from the ground-up allows operations to be cloud-native.

However, throughout the whole process of transforming, we need to remember that travel and hospitality ultimately exist because of one person: the traveler. Having their hopes and expectations front of mind will ensure that transforming travel happens in the right manner, and with the right cadence, in a way that benefits all stakeholders, without compromising innovation. This is a balancing act.

The topic of transforming travel is something that is close to the heart of teams across every business unit at Amadeus. The IT company has ambitious plans and has been successfully transforming for the future at an accelerated pace. To enable this change, Amadeus works closely with world-class tech partners, some of which you have heard from in this report. When it comes to technology, the transformation process never ends.

Importantly, we're in this together. Let's continue to remove the barriers that cause stress and friction in the journey. The travel and hospitality industries should be proud of how far they've come – so let's carrying on dreaming big and acting boldly.

It's what makes this industry great, and what delivers great experiences as a result.

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Methodology | Contributors

The fieldwork for *Connected Journeys: How Technology Will Transform Travel in the Next Decade* was conducted by independent research firm Opinium during June 2025. It includes responses from a total of 9,500 adults who travel abroad for leisure or business at least once a year, from China, France, India, Singapore, Spain, UK, and the United States.

Additionally, more than 20 in-depth insight interviews about how travel and hospitality are transforming, were also conducted with travel providers and sellers, hospitality companies, technology professionals and Amadeus experts.

We would like to thank the many business partners and customers as well as Amadeus colleagues whose insights and experiences proved invaluable in helping formulate the content of this report.

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