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Amadeus Insights

How can AI make travel work better?

October 2024

A survey from the
Spanish traveler's perspective

Introduction

Firefighters use it to predict where wildfires might strike next. Doctors use it to help analyze medical images. Marketers use it to create targeted ads. And many of us have interacted with an AI-powered chatbot by now, whether it be for personal or professional use. It's only been two years since Open AI released the first version of Chat GPT and already, artificial intelligence is part of our day-to-day lives.

And this is just the beginning. According to **research** ⧉ by McKinsey, Generative Artificial Intelligence (Generative AI) – which creates original text, images, voice, or other media based on prompts—could contribute $2.5 trillion in value to the global economy.

> In the travel, transportation, and logistics sector alone, Generative AI could create $240 billion, or two per cent of total sector revenue.

In Spain, **Statista** ⧉ has projected the AI market size to grow annually by 28.46% between 2024 – 2030, resulting in a market volume of S$12.45bn.

The travel industry – much like the rest of the world – is undergoing a massive technological revolution. As we integrate Generative AI into our core operations, the way we interact with travelers could shift dramatically, creating new opportunities to increase productivity, personalization, and customer satisfaction. Already, AI-driven platforms are curating unique travel experiences and chatbots are reshaping how travelers plan, book, and experience their journeys.

As a leader in travel technology, Amadeus recognizes the immense potential of Generative AI to enhance traveler experiences, streamline operations, and foster innovation across the sector. Our commitment to advanced technologies positions us at the forefront of this evolution. But like everything that we do, we want to ensure that this technology is first and foremost at the service of travelers.

Our vision for the future is centered on a more connected and human-centered travel experience, so we wanted to know what travelers think of Generative AI: how do

they feel about the Generative AI tools on the market right now, what are they excited about, and how do they want to use it in the future? These are the questions that guided this survey of Spanish travelers. By understanding customer perspectives, we can make sure that our use of Generative AI is welcomed by travelers and leads to successful growth in the travel industry.

What is AI & Generative AI?

→ **Artificial intelligence (AI)** is a set of technologies that enable computers to perform a variety of advanced functions, including the ability to see, understand and translate spoken and written language, analyze data, make recommendations, and more.

→ **Generative Artificial Intelligence (Generative AI)** is a type of Artificial Intelligence that can create original text, images, voice, video or other data based on prompts.

Methodology

The questions were answered by 2211 Spanish adults in an online survey conducted between August 28th and September 5th, 2024, by YouGov for Amadeus. The figures have been weighted and are representative of all Spanish adults aged 18+.

YouGov®

YouGov question:

For which, if any, of the following activities have you used AI tools

(such as ChatGPT or virtual assistants)?

29%

of Spain adults use Generative AI **for general queries**

23%

do so **for topic explanations**

42%

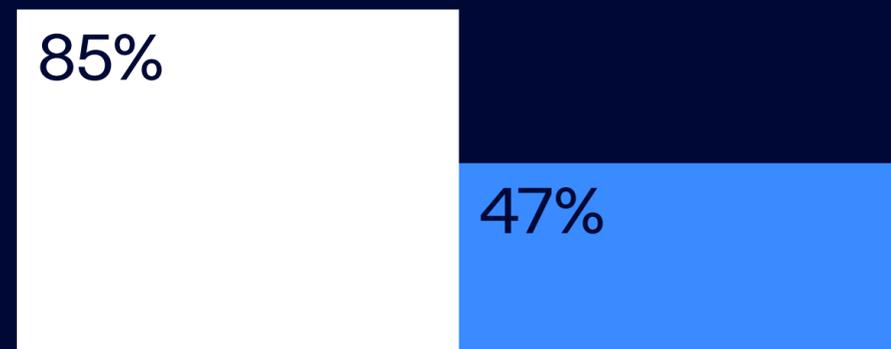of Spain adults **haven't tried Generative AI tools yet**

Generative AI for general queries

32%	25%
Males	Females

18–24 year-olds

85%	47%
Have used Generative AI, making them the most frequent users	Use Generative AI to explain topics they want to better understand

29% Answering general queries

23% Explaining topics (i.e. topics I want to understand better)

20% Improving work productivity (e.g. summarising text or emails)

18% Seeking recommendations aligned to my interests

13% Finding the best deals

9% Researching a potential trip

3% Other

6% Don't know

42% Not applicable - I have not used GenAI tools (such as ChatGPT or virtual assistants)

Did you know...

Today, Amadeus is using **Copilot for Microsoft 365** ⬀. Currently deployed to 10,000 employees, the tool incorporates Generative AI within Outlook, Teams, PowerPoint, Excel. With effective human supervision, Generative AI is assisting us with data driven decision-making processes and has shown to increase employee efficiency.

"The findings show young people have a strong inclination to turn to AI to answer questions and learn something new, with the keenest adopters using it to plan their trips, and to find the best deals. This shows that people respond best to technology that is intuitive, easy to use, and that serves their immediate needs. Adoption will increase as the travel industry continues to invest in innovative AI solutions that deliver even more relevant and personalized content in an intuitive way."

Christian Boutin
Director General for Spain and Portugal
Amadeus

Even if you haven't used an AI tool, which, if any, of the following areas would you say AI could benefit you when traveling?

58%

of Spanish adults **see real-time language translation as the most beneficial use-case** for Generative AI

38%

of Spanish travelers could see themselves **using AI to search for flights, hotels and rental cars**

Benefits of AI while traveling:

Aiding baggage handling

25%	20%
Female	Male

Women (25%) are slightly more likely than men (20%) **to see the benefit of AI in tracking luggage in real-time or managing lost luggage claims**.

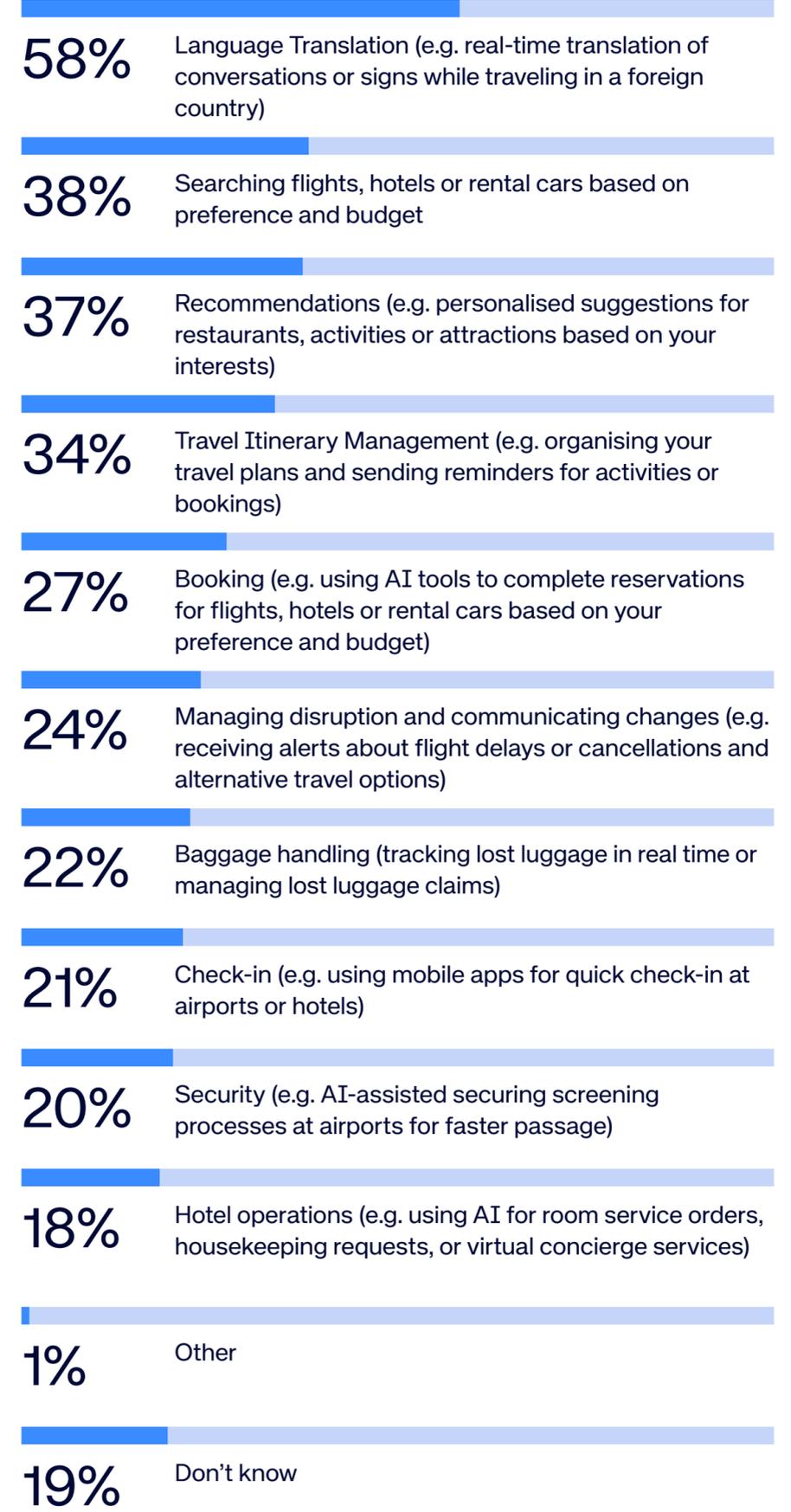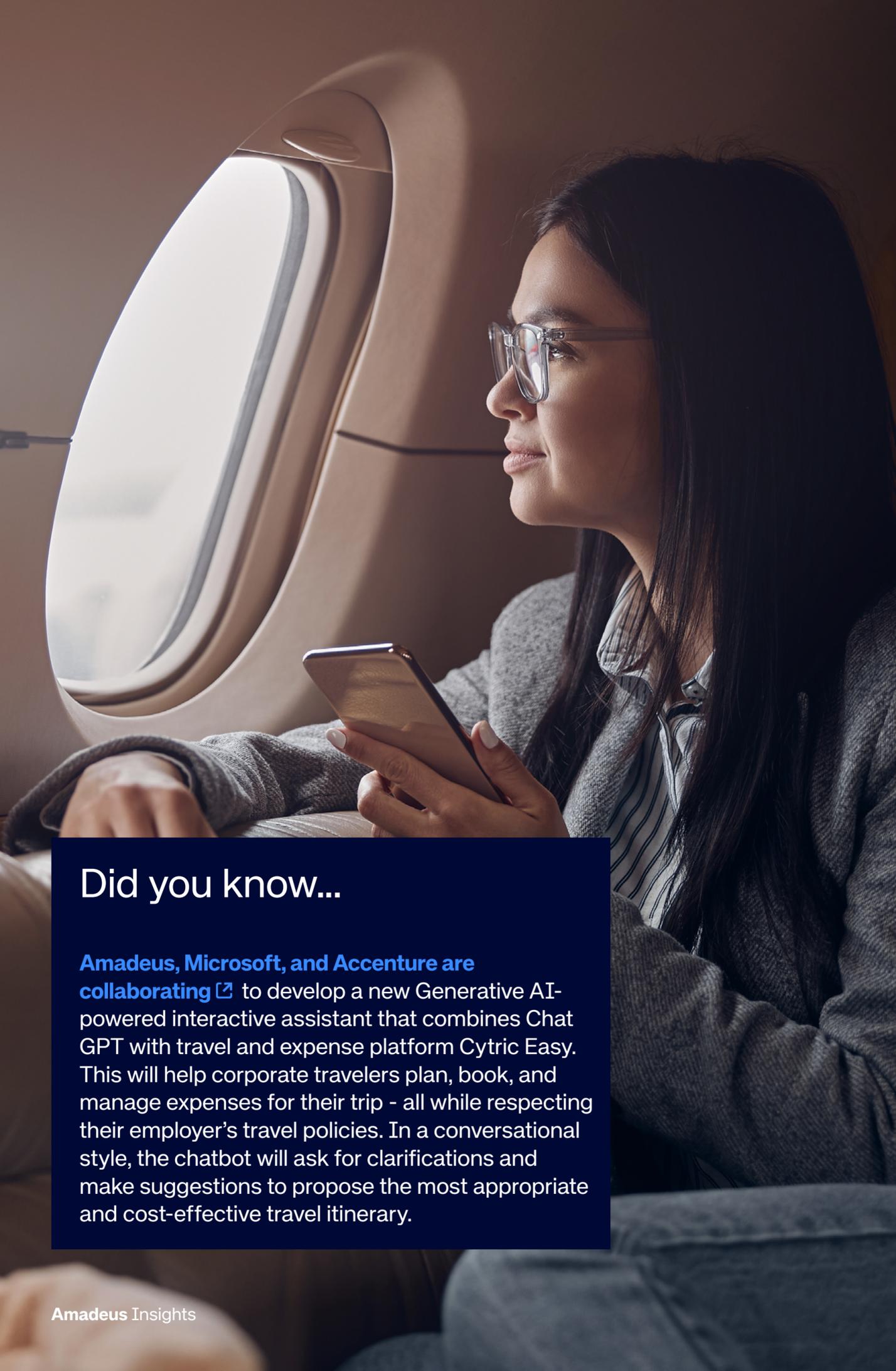**Check-in**

24%	20%
Female	Male

Women (24%) were also more likely than men (19%) **to use AI to check-in to a hotel or flight**.

Even if you haven't used a AI tool, **which, if any, of the following areas would you say AI could benefit you when traveling?**

58% Language Translation (e.g. real-time translation of conversations or signs while traveling in a foreign country)

38% Searching flights, hotels or rental cars based on preference and budget

37% Recommendations (e.g. personalised suggestions for restaurants, activities or attractions based on your interests)

34% Travel Itinerary Management (e.g. organising your travel plans and sending reminders for activities or bookings)

27% Booking (e.g. using AI tools to complete reservations for flights, hotels or rental cars based on your preference and budget)

24% Managing disruption and communicating changes (e.g. receiving alerts about flight delays or cancellations and alternative travel options)

22% Baggage handling (tracking lost luggage in real time or managing lost luggage claims)

21% Check-in (e.g. using mobile apps for quick check-in at airports or hotels)

20% Security (e.g. AI-assisted securing screening processes at airports for faster passage)

18% Hotel operations (e.g. using AI for room service orders, housekeeping requests, or virtual concierge services)

1% Other

19% Don't know

"Even amongst those who haven't yet embraced Generative AI, there's a clear recognition of its potential throughout the travel journey, from search, booking, and check-in as well as real-time reminders during a trip. This aligns with Amadeus' commitment to develop solutions that put travelers first and make the experience of travel better."

Santiago Franco
Head of Product, Engineering & Customer Operations for Cytric Solutions
Amadeus

Did you know...

Amadeus, Microsoft, and Accenture are collaborating ⧉ to develop a new Generative AI-powered interactive assistant that combines Chat GPT with travel and expense platform Cytric Easy. This will help corporate travelers plan, book, and manage expenses for their trip - all while respecting their employer's travel policies. In a conversational style, the chatbot will ask for clarifications and make suggestions to propose the most appropriate and cost-effective travel itinerary.

Which, if any, of the following challenges have you faced when using AI for trip planning?

20%

of Spain travelers **are concerned around security and privacy**

17%

of Spain travelers **are concerned by a lack of a human perspective**

Find AI tools are too complex

14%

18–24-year-olds

9%

Adults aged 55+

51%

of women have yet to use AI tools for any trip planning

For which, if any, of the following activities **have you used GenAI tools** (such as ChatGPT or virtual assistants)?

20% Security and privacy concerns (e.g. worries about how personal data is collected, stored and used by AI systems)

17% Lack of human perspective (e.g. preferring to interact with human agents or planners rather than AI)

15% Concerned about potential of bias (e.g., worries that AI may not provide fair or unbiased recommendations)

15% Lack of awareness or information or limited access to technology (e.g. not knowing enough about AI tools and their benefits in travel)

14% Lack of trust in AI recommendations (e.g. scepticism about accuracy or reliability of AI-generated suggestions)

13% Outdated information, or inaccuracy and errors

10% Complexity of AI tools (finding AI applications difficult to use or understand. Not knowing the right prompts to generate desired outcome)

1% Other

6% Don't know

47% Not applicable - I haven't used AI tools for any trip planning

"The challenges identified by travelers when using Generative AI for trip planning underscore the need for greater transparency and trust in these technologies. Amadeus is dedicated to addressing these concerns by integrating robust security measures and ensuring our AI tools provide reliable and unbiased recommendations. We believe that technology has the potential to drive positive change when it is developed with human values at its core."

Did you know that Amadeus has signed the EU AI Pact?

This commitment underscores Amadeus' dedication to responsible AI development and deployment in the travel industry. By aligning with this initiative, Amadeus aims to promote transparency, accountability, and ethical practices in AI usage, ensuring that the technology serves travelers' best interests while adhering to regulatory standards. Additionally, our technology is always designed following **Amadeus' AI Ethics Principles** ↗ in order to ensure ethical, transparent and responsible use.

Beatriz Mendez-Villamil
Global CIO
Amadeus

Which, if any, of the following features of an AI travel assistant would you be likely to use?

29%

of Spain adults are inclined to use **AI travel assistants for itinerary creation**

28%

would use it **for real-time updates on flight status, gate-changes, and weather conditions**

35%

25-34 age group are interested in using AI travel assistants to help with itinerary creation including suggesting activities, restaurants and accommodation

Which, if any, of the following features of an AI travel assistant would you be likely to use?

29% AI travel assisting with itinerary creation by suggesting activities, restaurants, and accommodations

28% AI travel helping with real-time updates on flight statuses, gate changes, and local weather conditions
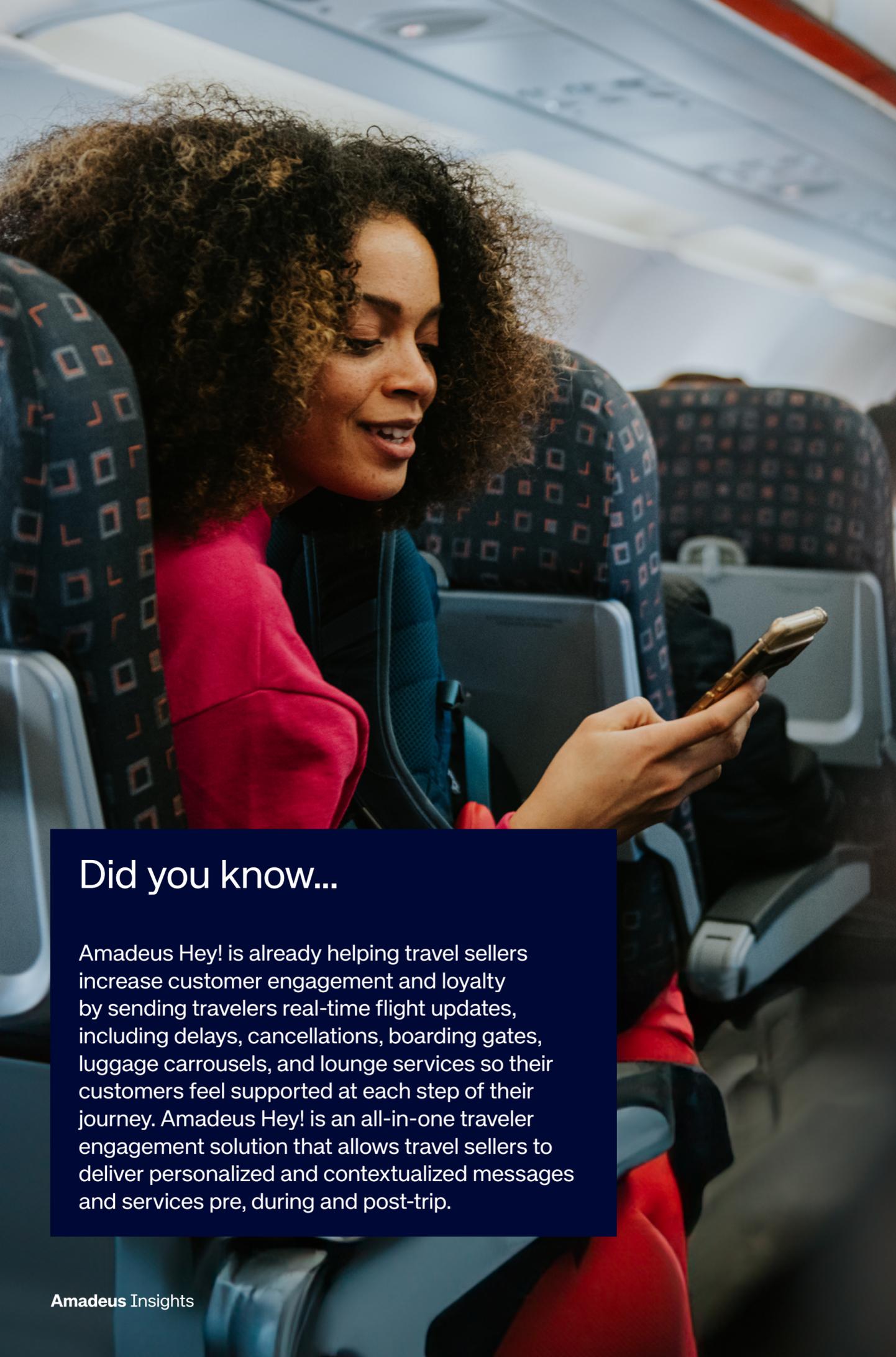
27% AI travel answering questions about travel regulations, visa requirements, or local customs

27% AI travel assistant providing personalized travel recommendations based on your preferences and past travel experiences

25% AI travel helping with booking flights, hotels, and activities directly through the assistant

13% Don't know

30% Not applicable - I would never use an AI travel assistant

"Almost one third of Spanish adults are already curious about using Generative AI as a digital travel assistant. This shows a tremendous growth opportunity in this sector. We envision a future where every traveler has a personalized digital companion, guiding them through their journey with insights tailored to their unique preferences. Technology should not only simplify the planning process, but also enrich the travel experience, transforming ordinary trips into extraordinary adventures. As we embrace these innovations, we have the chance to redefine travel, making it better for everyone".

Rodrigo Acuña
Head of Research
Amadeus

Did you know...

Amadeus Hey! is already helping travel sellers increase customer engagement and loyalty by sending travelers real-time flight updates, including delays, cancellations, boarding gates, luggage carrousels, and lounge services so their customers feel supported at each step of their journey. Amadeus Hey! is an all-in-one traveler engagement solution that allows travel sellers to deliver personalized and contextualized messages and services pre, during and post-trip.

A transformative moment for travel:

How traveler needs are fueling innovation across the industry

At Amadeus, we see a future in which travelers will be able to click on an image from a destination and interact with a chatbot to plan a trip to get there. Or maybe they will type, "Hey, I want to go surfing in Latin America. I have two weeks to travel in December and this is my price range. What do you recommend?" During their trip, they will get real-time travel updates, and biometrics will make their journey through the airport a breeze. When they arrive, they'll get personalized restaurants and activity recommendations on their smartphone, and will chat with locals in any language. And most importantly, the information they get will be reliable, unbiased, and secure.

From inspiration, through to search, booking, checking-in, on-trip, and post-trip, we believe the opportunities to create more traveler-centric journeys with Generative AI are vast.

Placed at the heart of the travel ecosystem, Amadeus is uniquely positioned to develop new human-centered travel innovations with Generative AI. Innovation is

part of our DNA and we are collaborating with some of the brightest minds across travel and tech to move the travel industry forward. We're working with airlines to rapidly draft multilingual destination webpages that are optimized for SEO (Search Engine Optimization) in minutes. With **Microsoft and Accenture** ⬈, we're simplifying corporate travel with AI-powered chatbots. And with Microsoft Azure's Open AI, we're making **hotel intelligence more accessible** ⬈ and actionable for even the least tech-savvy hoteliers. But this is just the beginning. **Our joint innovation program with Microsoft** ⬈ will allow us to continue innovating with leading experts on Generative AI to address travel industry needs with the latest foundation models and cutting-edge solutions.

All of this is exciting, but we're mindful that we must also address the potential concerns around Generative AI. That is why all of our AI technology is required to be designed following **Amadeus' AI Ethics Principles** ⬈ in order to ensure ethical, transparent, and responsible use. We have also signed the **EU AI Pact** ⬈ and are

committed to best practices to make travel a force for good. Our commitment to ethical AI extends to our People & Culture practices, and we have created a task force responsible for developing and executing the use of AI in key areas like recruitment, employee development and performance management.

If we collectively harness the power of the travel ecosystem and take a responsible approach that puts the traveler first, we are confident that the travel industry can successfully use Generative AI to make the experience of travel better.

"A key part of our mission at Amadeus is to foster a workplace culture that is not only open and collaborative but also inclusive. With the launch of INCLUJOB, our AI-driven tool for creating more inclusive job advertisements, we are taking significant steps to use language that appeals to a wider audience in our recruitment processes. INCLUJOB also serves as a powerful training and education tool by highlighting wording that could prevent some groups from applying, explaining why the wording could deter them, and suggesting alternatives. With this tool, we are leveraging many positive impacts of AI, beyond productivity."

"Generative AI has the potential to impact on every stage of the journey, meaning each solution, platform, or technology we currently produce could be impacted. This is not an incremental change – it is a potentially revolutionary one. Amadeus is committed to exploring the potential of this new technology and excited about what the future holds."

Ana Doval de las Heras
Senior VP People & Culture
Amadeus

Sylvain Roy
Chief Technology Officer
Amadeus

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It's how travel works better.