

amadeus

Amadeus Insights

# Global Mobility Trends: Decoded

Traveler Insights 2026

Amadeus. It's how travel works better.

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# Foreword



The mobility landscape is evolving at an extraordinary pace, reshaping not only how we travel but how we connect with the world.

As industry leaders, our responsibility extends beyond simply bringing people from point A to point B. We must listen deeply to travelers' evolving needs and aspirations, and reimagine journeys as seamless, intuitive, and centered on the individual.

This report is a call to action: to innovate boldly, to put people at the heart of every solution, and to unlock new possibilities for travel that inspire and empower.

**Peter Altmann**

Vice-President, Mobility and Travel Protection,  
Amadeus

# Introduction

This report presents a comprehensive analysis of today's global mobility landscape, drawing on insights from a survey of 3,000 travelers across Latin America, North America, Europe and Asia Pacific, and interviews with leading industry experts. It explores the full traveler journey: from pre-trip planning to in-trip experiences and post-trip engagement, highlighting the trends, behaviors, and innovations shaping the future of travel. The findings offer actionable guidance for stakeholders seeking to deliver seamless, traveler-centric experiences. Whether you are a mobility provider, travel seller, or industry strategist, these insights are designed to guide your decisions and inspire new approaches in a rapidly changing world.



# 5 key highlights



## Digital channels dominate and AI is on the rise:

Almost all car hires and transfers are booked online, via indirect or direct channels, and nearly seven in ten travelers say they would use an AI-powered travel assistant.

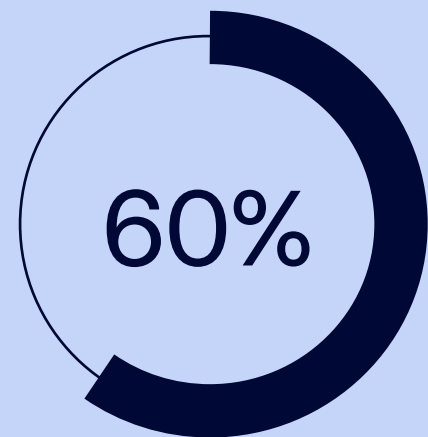


## Integrated mobility is now indispensable:

Nearly nine in ten travelers find door-to-door journey coordination service useful, showing strong demand for seamless integration.



## Sustainability is a priority, not an option, and travelers are willing to pay for it:

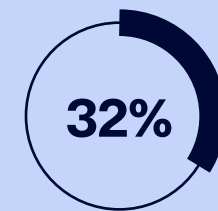


Over 60% of travelers—especially gen Z, millennials—are willing to pay a premium for more sustainable options such as electric vehicles and sustainability-focused transfers.

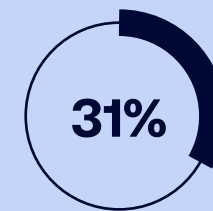


## Friction persists despite convenience gains:

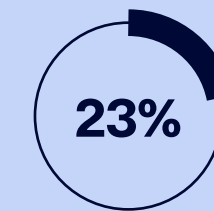
Major pain points:



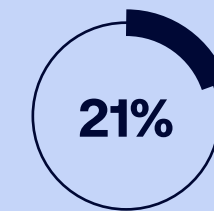
Language barriers



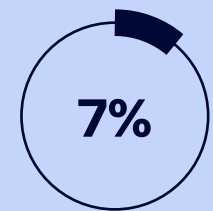
Unexpected costs



Poor information



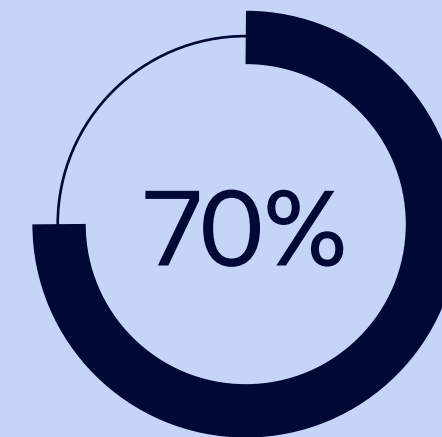
Long queues



Completely smooth journey



## From simple point transaction loyalty to real experiential loyalty:



Of travelers consider loyalty programs important and expect real-time offers, personalized rewards, seamless point redemption across modes, and exclusive perks.



# Pre-trip behaviors

Understanding how travelers plan their journeys before departure is essential for anticipating their needs and delivering seamless mobility experiences. The pre-trip phase sets the tone for the entire travel experience, influencing not only satisfaction but also perceptions of convenience, value, and sustainability.

# When travelers plan ground transportation: most plan ahead.

## When do you typically plan the hired ground transportation (e.g. car rental, transfers, city transit) for your destination?:



Most travelers (67.4%) arrange ground transportation—like car rentals or airport transfers—a few days to several weeks before their trip. The most common booking window is 1–4 weeks prior (25.5%), followed closely by last-minute planners (24.9%).

## Regional differences are significant:



**19% of North American travelers wait until they're settled**, favoring mobile-friendly, flexible booking options.

**In Latin America, 37% book just days before arrival**, making last-minute promotions impactful.

**52% of Asia Pacific and 43% of European travelers book at least a month or 1–4 weeks in advance**, suggesting that early marketing and personalized pre-trip offers are effective.

**Asia Pacific leads in early planning, with 72% booking before arrival.**

# Business travelers tend to book closer to arrival

and benefit from integrated corporate tools, while leisure travelers are more likely to book early.

**When do you typically plan the hired ground transportation (e.g. car rental, transfers, city transit) for your destination?:**

Business travelers

Leisure travelers



- 13% More than a month before I arrive
- 29% A few days before I arrive

- 21% More than a month before I arrive
- 21% A few days before I arrive



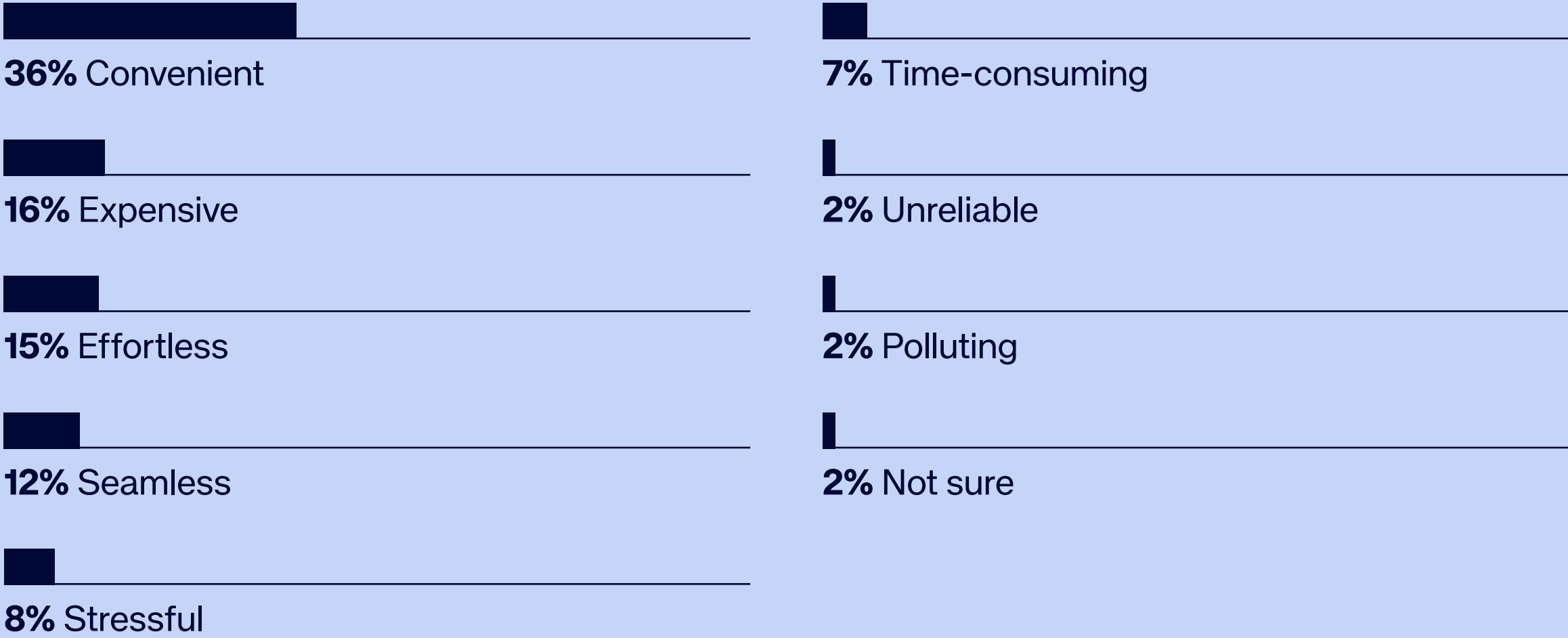
# Overall, the sentiment regarding mobility and transport experiences is positive:

More than a third of respondents (36%) described their last international trip as 'convenient,' with leisure and business travelers largely in agreement. The perception of convenience (36%) and effortless (15%) reveals an opportunity for providers to further differentiate by maintaining high service standards and leveraging user testimonials or satisfaction ratings. However, with 16% describing services as 'expensive,' there is a clear incentive for travel players to address concerns through transparent pricing and value-added packages.

## Regional differences stand out:

Europeans rate mobility higher than other regions in terms of convenience (42%), while Latin Americans report less convenience (26%) but the most effortless experience (27%). Asia-Pacific travelers find mobility fairly convenient (37%) but cite higher costs (21%). North Americans, who plan trips more spontaneously, report lower convenience (35%) and greater concerns about cost (19%) and stress (12%). Overall, early, proactive planning is linked to higher satisfaction, while last-minute planning tends to increase perceived cost and stress.

## An overall positive experience regarding mobility:



# Bundling is common with car rental

Travelers book the following at the same time as car rental:

**63%**  
Accommodation

**54%**  
Flights

**36%**  
Travel insurance

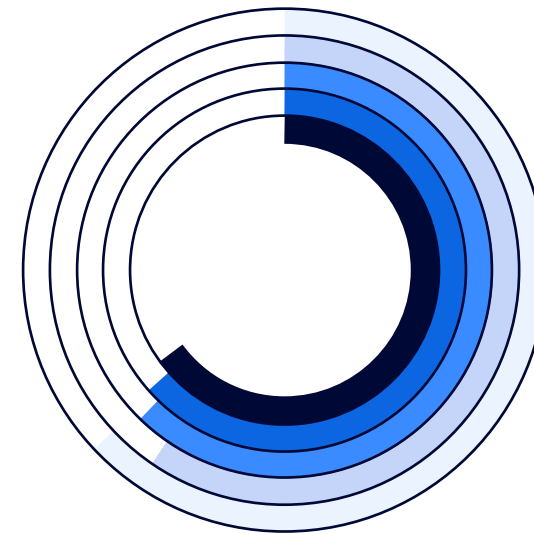
These choices likely reflect differing travel priorities and local market offerings.

Demographic analysis highlights further differences: Younger travelers are more interested in enhancing their experiences at the destination, whereas older travelers would prioritize security and logistics.

In summary, the bundling of services with car rentals is widespread, but the specific combinations chosen vary depending on both the traveler's region and age group. These trends indicate opportunities for travel providers to tailor bundled offerings to meet the distinct needs and preferences of different customer segments.

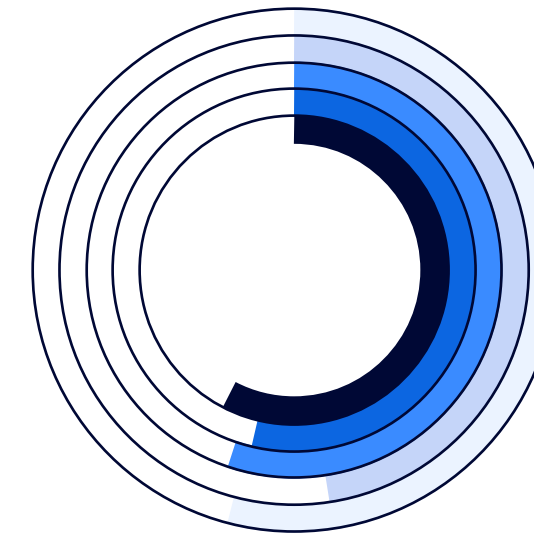
Travelers cited that when they book car rental, they also usually book the following:

Hotel/Accommodation



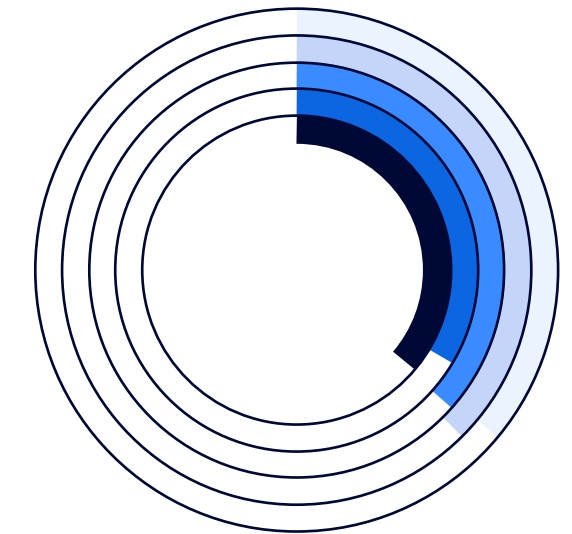
Global **63%**  
Gen Z **59%**  
Millennials **62%**  
Gen X **64%**  
Boomers **65%**

Flights



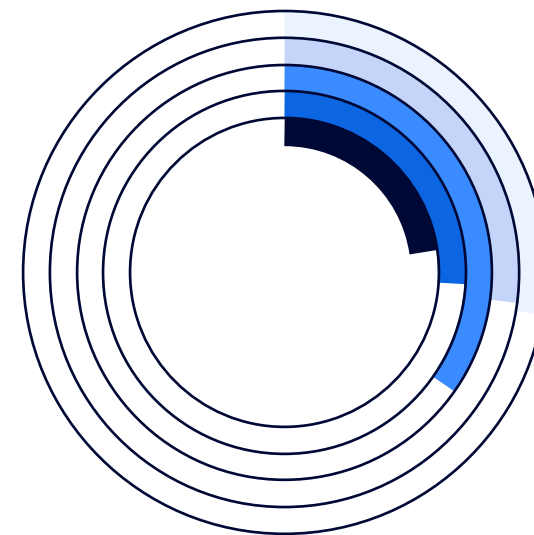
Global **54%**  
Gen Z **47%**  
Millennials **55%**  
Gen X **53%**  
Boomers **57%**

Travel insurance



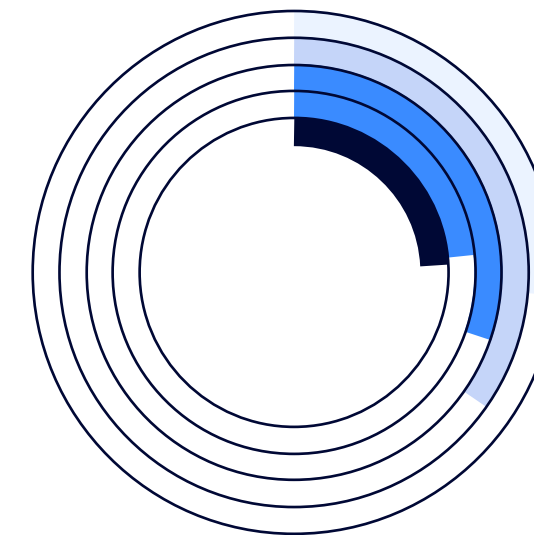
Global **36%**  
Gen Z **38%**  
Millennials **37%**  
Gen X **33%**  
Boomers **37%**

Attraction or tour tickets



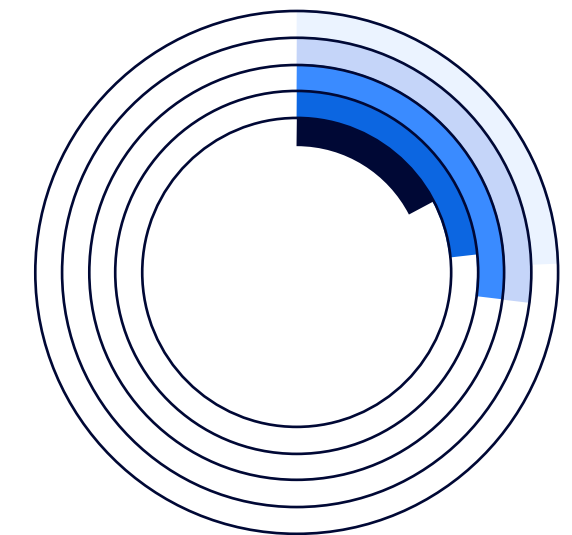
Global **28%**  
Gen Z **27%**  
Millennials **32%**  
Gen X **26%**  
Boomers **22%**

Trains or bus tickets



Global **27%**  
Gen Z **33%**  
Millennials **29%**  
Gen X **23%**  
Boomers **24%**

Airport parking



Global **24%**  
Gen Z **27%**  
Millennials **27%**  
Gen X **23%**  
Boomers **16%**

○ Global   ○ Gen Z   ● Millennials   ● Gen X   ● Boomers



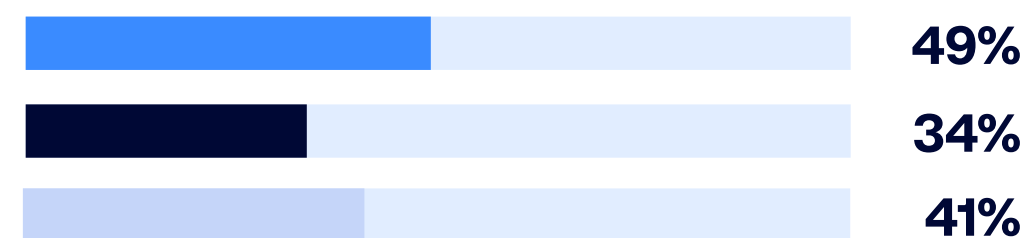
**Booking channels:  
Digital dominates for car rental booking**

Which of the following channels have you ever used to book a car rental for an international trip?

■ Business ■ Leisure ■ Average



Airline or hotel website



Corporate travel managers



Online travel sites



Car rental websites



The research on booking channels for car rentals reveals that digital platforms are the clear leaders, with the majority of travelers preferring to book through car rental websites (55%) or online travel agencies (53%). Airline and hotel websites (41%) and corporate travel managers (18%) also play important roles, particularly for business travelers. Notably, leisure and business travelers show similar preferences for car rental websites, but business travelers are more likely to rely on corporate travel managers (26%) and airline/hotel websites (49%).

From Amadeus' perspective, the recent launch of Amadeus Cars Quick-Connect and Amadeus Transfers Quick-Connect empowers travel sellers to participate more readily in online distribution. These solutions offer flexible, scalable, and simplified APIs that ensure seamless integration, leveraging state-of-the-art technologies to streamline connectivity and enhance product offerings for both travelers and providers.



When it comes to key attributes, travelers have experienced better competitive pricing and offers from car rental websites (45%) and airline or hotel websites (39%), easier price comparison (48%) from online travel sites and greater customer support (42%) from corporate travel managers.

**Top attributes per channel:**



**45%**

Competitive price and offers from car rental websites



**48%**

Easy price comparison



**42%**

Great customer support



**39%**

Competitive price and offers from airline or hotel websites

**Top 3 perks and services per traveler type:**



**Leisure**



**Business**



**Car rental websites**

- 1 Competitive price and offers
- 2 Reliable and clear information
- 3 Easy price comparison

- 1 Reliable and clear information
- 2 Competitive price and offers
- 3 Easy price comparison



**Online travel sites**

- 1 Easy price comparison
- 2 Competitive price and offers
- 3 Reliable and clear information

- 1 Easy price comparison
- 2 Reliable and clear information
- 3 Competitive price and offers



**Corporate travel managers**

- 1 Great customer support
- 2 Easy price comparison
- 3 Reliable and clear information



**Airline or hotel website**

- 1 Easy price comparison
- 2 Competitive price and offers
- 3 Reliable and clear information

- 1 Competitive price and offers
- 2 Reliable and clear information
- 3 Great customer support

Demographically, millennials favor online travel sellers (58%) for booking car rentals, highlighting the importance of easy price comparison and bundled travel packages for this group.

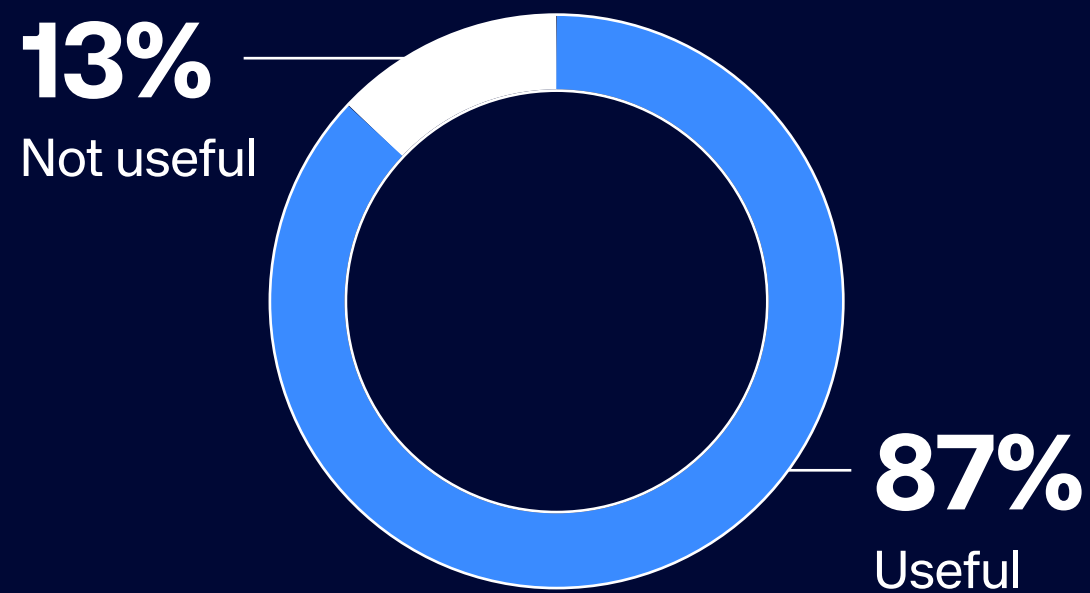
Gen Z shows the greatest enthusiasm for using airline or hotel websites (48%), suggesting a preference for reliable information and loyalty program benefits. Older generations prefer to book directly with car rental websites (Generation X: 53%, and Boomers: 57%).



**There is a strong demand for integrated mobility solutions.**

Nearly 9 in 10 travelers find both pre-trip and in-trip integrated mobility services useful. Millennials are the most enthusiastic with 91% finding them useful. Overall, 47% of respondents reported integrated mobility services to be 'very useful'.

This underscored a preference for simplicity: travelers want convenience and a single point of coordination. This is where digital tools are the most valued, with real-time, app-based solutions, especially pre-trip but also during the trip.



By connecting to the Amadeus Mobility platform, travel sellers can benefit from global content coverage, gaining access to global, multinational, and local providers. They will also benefit from real-time availability for better comparison, thanks to data standardization across all providers.

“As travelers increasingly expect seamless, door-to-door journeys, delivering truly integrated mobility requires strong collaboration, smart technology, and a relentless focus on real customer needs. At Enterprise Mobility, we are working closely with partners like Amadeus to bring our broad portfolio of mobility solutions directly into the platforms where travelers are already booking their trips. By integrating across systems and touchpoints, we help simplify the journey from the very start—supporting a more intuitive, end-to-end experience that makes moving from one part of a trip to the next feel effortless. The pace of innovation is accelerating dramatically, touching every part of how we move from place to place. We are helping to advance innovation and breakthroughs in mobility options as they come to market by embracing new technology. At the same time, we work closely with the team members serving customers at the branch level to understand what customer problems are best solved with digital solutions as opposed to going digital “for digital’s sake.”

**Yvette Burke**

Vice President of Global Sales, Replacement & Leisure Division, Enterprise Mobility

**Majority open to paying more for sustainable options:**



Willingness to pay extra to access sustainable options



Over 60% of travelers globally are willing to pay at least a little more for sustainable options (sustainability-focused accommodation, low-emission transfers, electric vehicles, etc.). Most travelers are only willing to pay ‘a little more’ (46%, vs 16% for willing to pay ‘a lot more’), underlining the importance of incremental pricing and clear value communication in a price-sensitive environment.

# Ranking of sustainable options:



**#1**

Sustainability-focused accommodation

**#2**

Low-emission transfers to and from the airport

**#3**

Mobility providers with verified green certifications

“At Enterprise Mobility, our approach begins with listening to our customers and delivering an exceptional experience across a wide range of mobility needs. We offer a broad mix of vehicle categories and continue to evolve our offerings in line with market demand while operating one of the most fuel-efficient fleets in the industry. Leveraging our extensive global network and industry partnerships, we are uniquely positioned to build consumer awareness and understanding of EVs and emerging vehicle technologies through positive, real-world driving experiences that support long-term market viability. We also recognize the importance of informed choice, which is why we offer optional carbon offsets at the point of rental — allowing customers to align mobility decisions with their own sustainability goals.”



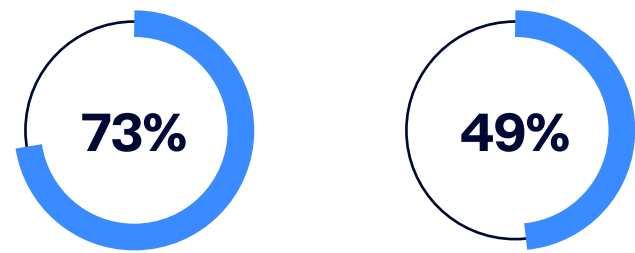
**Yvette Burke**

Vice President of Global Sales, Replacement & Leisure Division, Enterprise Mobility

**Insights on some sustainable options:**



**Electric vehicle renting options**

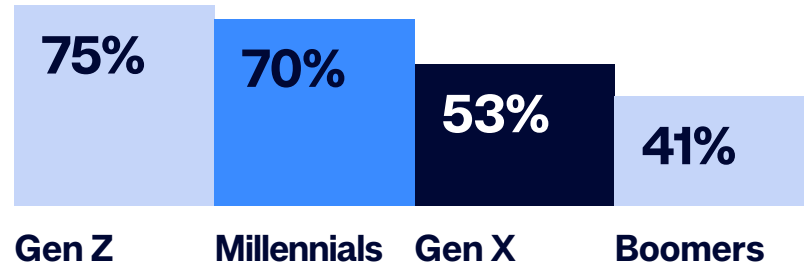


Business travelers Leisure travelers

Business travelers are (73%) more willing to pay extra than leisure travelers (49%) for this option.

Leisure travelers who rent occasionally (1 to 2 times a year) are not willing to pay more for this option (48%).

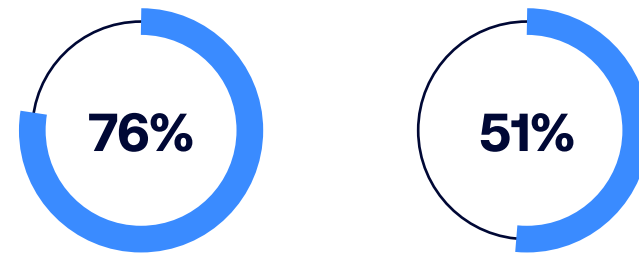
Younger generations are more willing to pay for this option than older generations:



Latin America is the region most willing to pay for this option with 78% of travelers saying 'yes'.



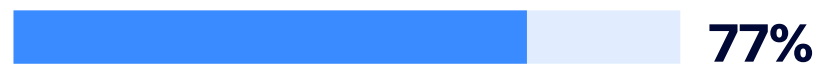
**Low-emission transfers to and from the airport**



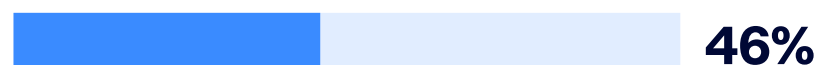
Business travelers Leisure travelers

Business travelers are more willing to pay for this option than leisure travelers: 76% for business and only 51% for leisure.

Latin America is the region most willing to pay for this option, with 77% responding with 'yes'.

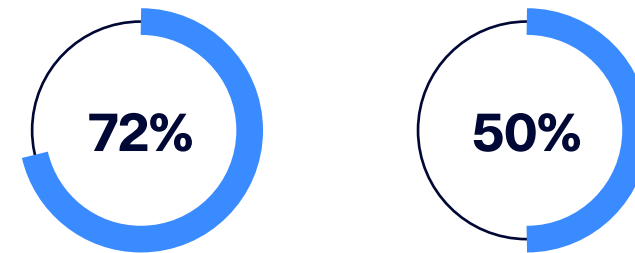


Leisure travelers who book transfers occasionally (1 to 2 times a year) are not willing to pay anything more (46%).



**Carbon neutral insurance**

E.g. travel protection that includes some form of carbon offset



Business travelers Leisure travelers

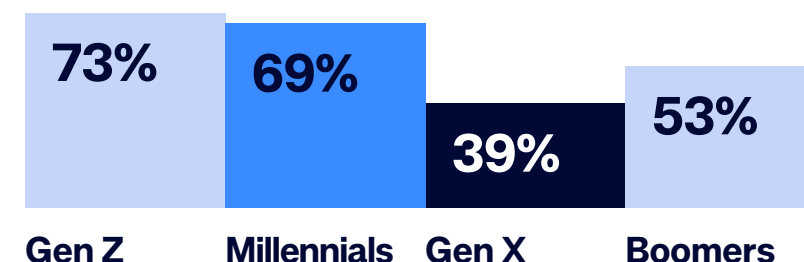
Business travelers are more willing to pay extra than leisure travelers.

77% of leisure travelers who frequently rent cars would be willing to pay extra, whereas 47% of leisure travelers who occasionally rent cars wouldn't pay extra for this.

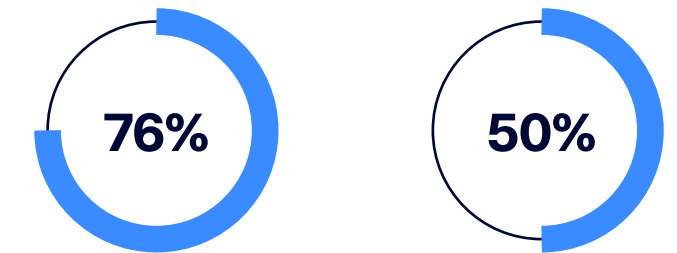


Would not be willing to pay extra for this.

Younger generations would be willing to pay extra compared to older generations:



**Mobility providers with green certifications**



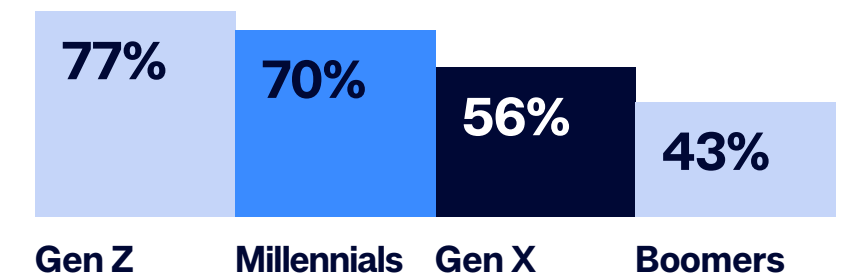
Business travelers Leisure travelers

Business travelers more willing to pay extra than leisure travelers (75% vs 50% for leisure).

Asia Pacific (57%) is the region least willing to pay extra compared to the other regions.



Younger generations would be willing to pay extra compared to older generations:



Sustainability is increasingly shaping traveler choices, with a notable majority expressing a willingness to pay at least a little more for more sustainable options.

These insights underscore the importance for mobility providers to tailor their sustainability offerings and pricing strategies to different customer segments, ensuring accessibility and value while advancing environmental goals.

From Amadeus' perspective, the Amadeus Mobility platform supports travelers' desire for sustainability by providing transparent, reliable information on the environmental impact of their choices. The platform estimates the CO2 emissions generated for each trip using recognized industry standards such as Worldwide Harmonised Light Vehicle Test Procedure<sup>1</sup> (WLTP) and collaborates with standardization associations like the Association of Car Rental Industry Systems Standard (ACRISS). This approach empowers travelers to make informed decisions and compare options based on sustainability criteria, reinforcing the importance of clarity and trust in the booking process.

<sup>1</sup>A globally recognized testing standard developed under the United Nations framework to measure vehicle fuel consumption, energy use, and CO<sub>2</sub> emissions in conditions designed to better reflect real-world driving

The pre-trip planning phase is a decisive moment in the traveler journey, shaping expectations and influencing overall satisfaction. By understanding when and how travelers organize their mobility, providers can better anticipate needs, deliver targeted offers, and create seamless, integrated experiences.

“There is a clear gap between travelers' stated willingness to pay more for sustainable mobility and what they ultimately book. Price still matters at the moment of decision. What we see, however, is that this gap narrows dramatically when sustainability is built in by default rather than positioned as a premium choice. By operating an inherently lower-emissions fleet and expanding EV and hybrid options where infrastructure allows, we remove friction from the booking decision. Initiatives like our Green Heart Donation program also show that when sustainability is simple and transparent, travelers are willing to act on their intent.”

**Chay Lowden**

Chief Product Officer, Green  
Motion & U-Save International

## During the trip

The in-trip phase is where travelers' expectations meet reality. This period is shaped by the choices made during pre-trip planning, but it is also where flexibility, real-time information, and seamless integration of services become critical.

## How travelers get around at destination:

■ Business ■ Leisure

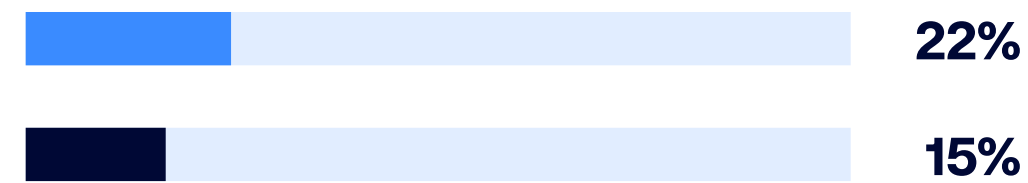
### E-scooter



### Bike / E-bike



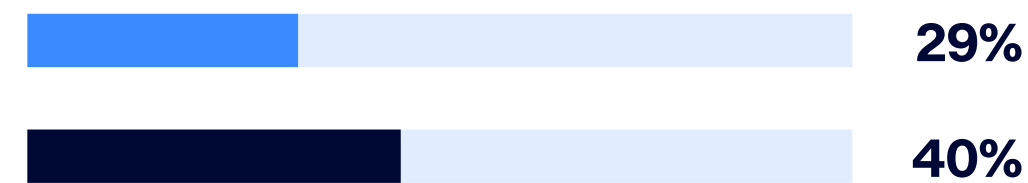
### Ride-sharing / Ride-hailing



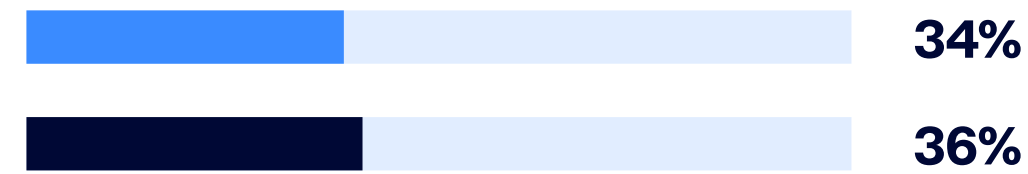
### Private transfer



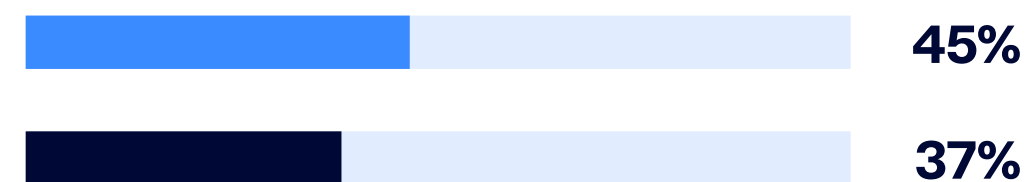
### Walking



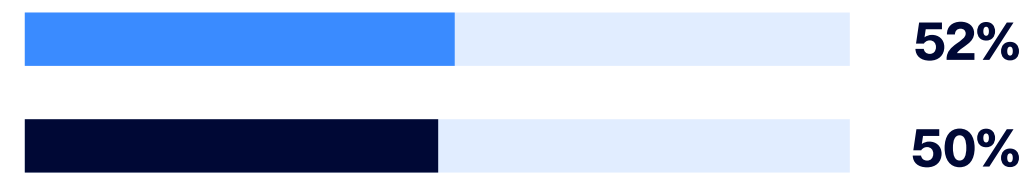
### Metro / Train / Bus



### Taxi



### Car rental



# Getting to and from hubs:

When it comes to traveling between major hubs such as airports, train stations, and city centers, travelers rely on a range of transport options that reflect both convenience and regional preferences:

Taxis and car rentals lead the way:



Hotel shuttles and public transport remain popular:



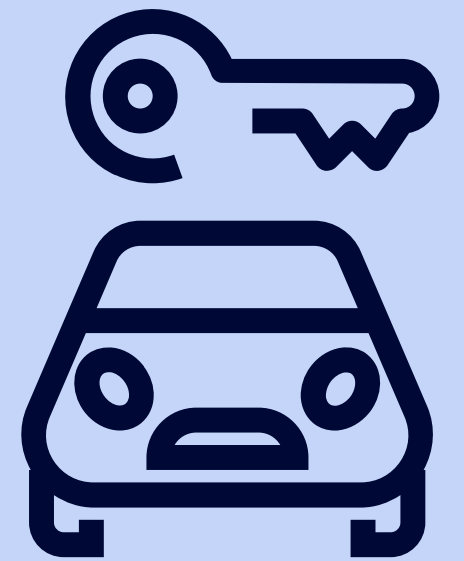
Private transfers and ride-hailing:



Walking and micromobility:



## Top 3 ground transportations to/from hubs per region [by preference]:



**North America**

- #1 Taxi
- #2 Car rental
- #3 Hotel shuttle

**Latin America**

- #1 Car rental
- #2 Taxi
- #3 Private transfer

**Europe**

- #1 Taxi
- #2 Car rental
- #3 Public transport

**Asia Pacific**

- #1 Public transport,
- #2 Taxi
- #3 Hotel shuttle

Travel preferences vary significantly across generations. Younger generations are at the forefront of adopting private transfers (26%), while older generations are more likely to use traditional taxis and hotel shuttles.

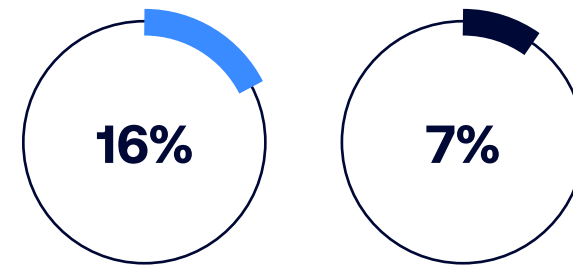
# At destination, modes of transport change

Interestingly, at destination, travelers would tend to use car rental more (from 40% to 51%). Travelers use private transfers less (19%) to get to and from hubs – this could be due to price sensitivity. It is also interesting to note that there is a high increase in walking at destination as compared to getting to/from hubs (from 21% to 35%).

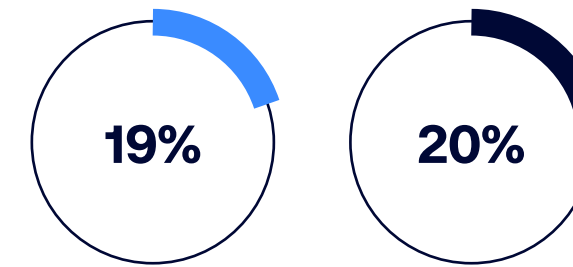
## Differences between at destination vs hubs transportation:

■ At destination ■ Get to/from hubs

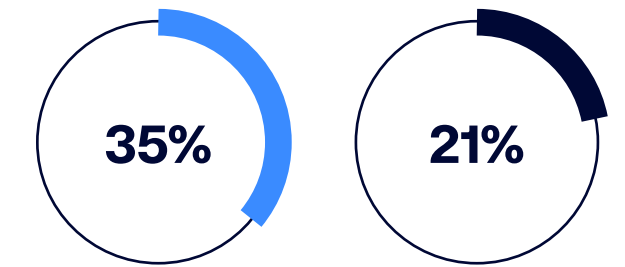
 Bike / Scooter rental



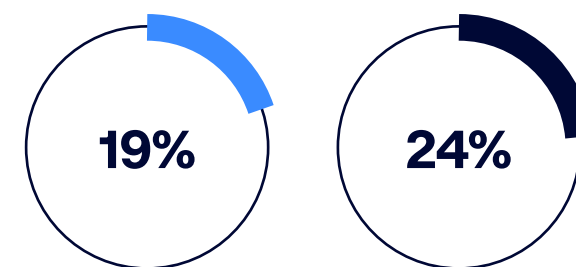
 Ride-sharing / Ride-hailing



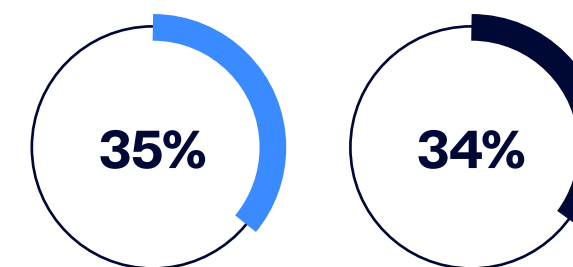
 Walking



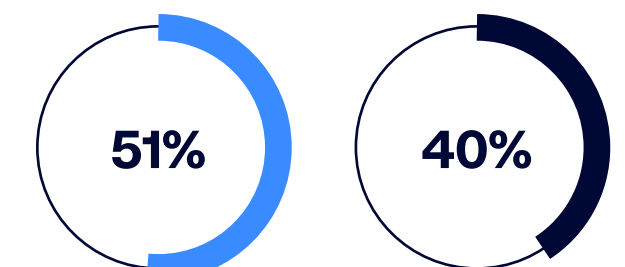
 Private transfer



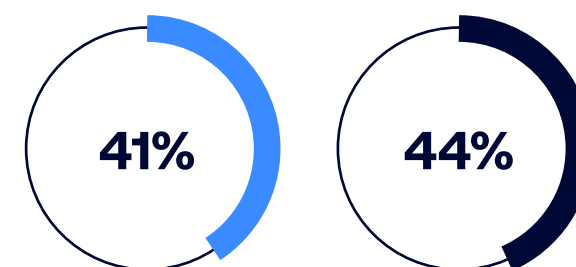
 Public transport



 Car rental



 Taxi



# Challenges faced during the trip

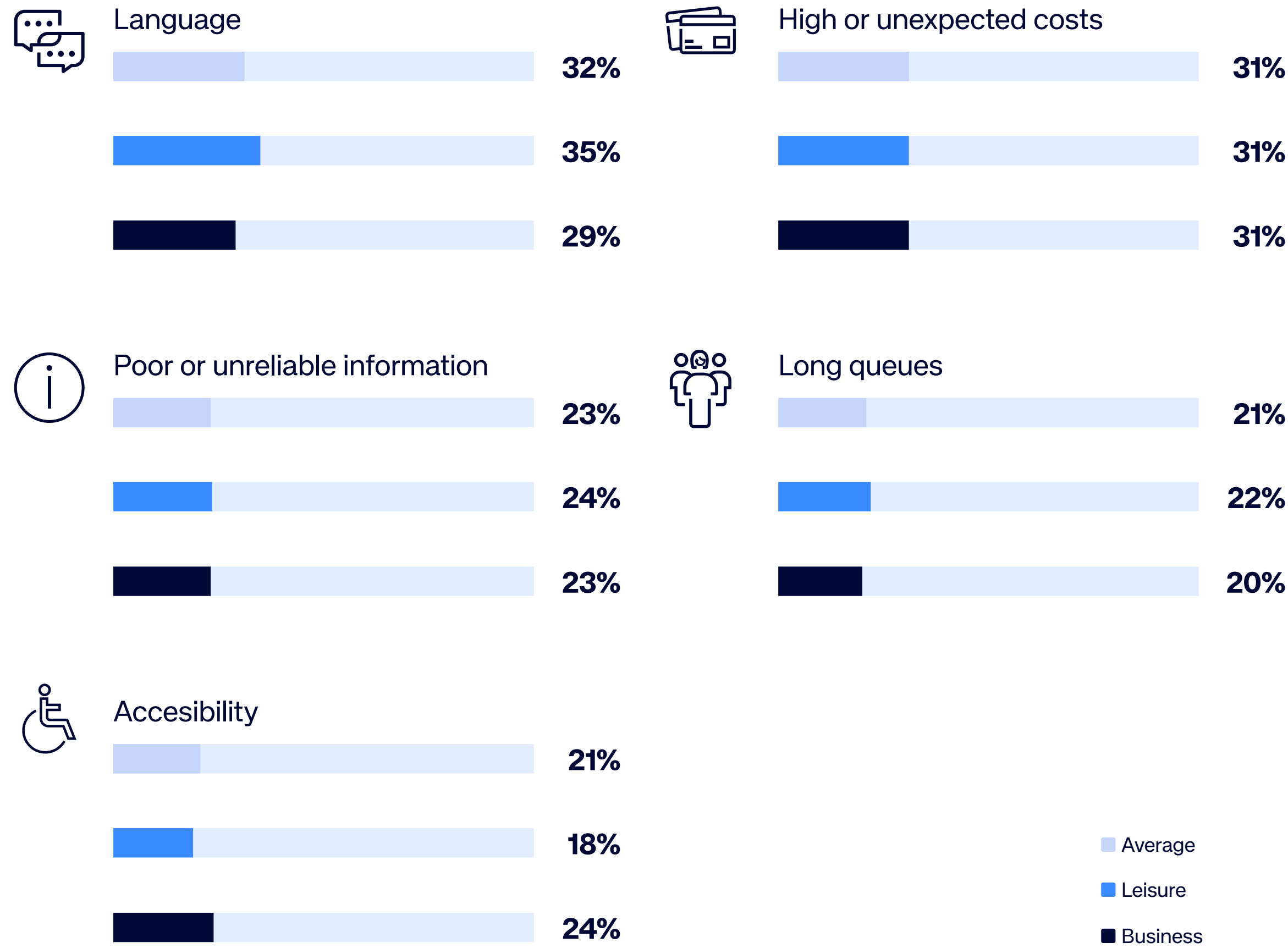
Travelers continue to encounter significant obstacles during their journeys, with the majority reporting at least one notable pain point.

In short, business travelers' main challenges are linked to whether the service is reliably available at the right place and time.

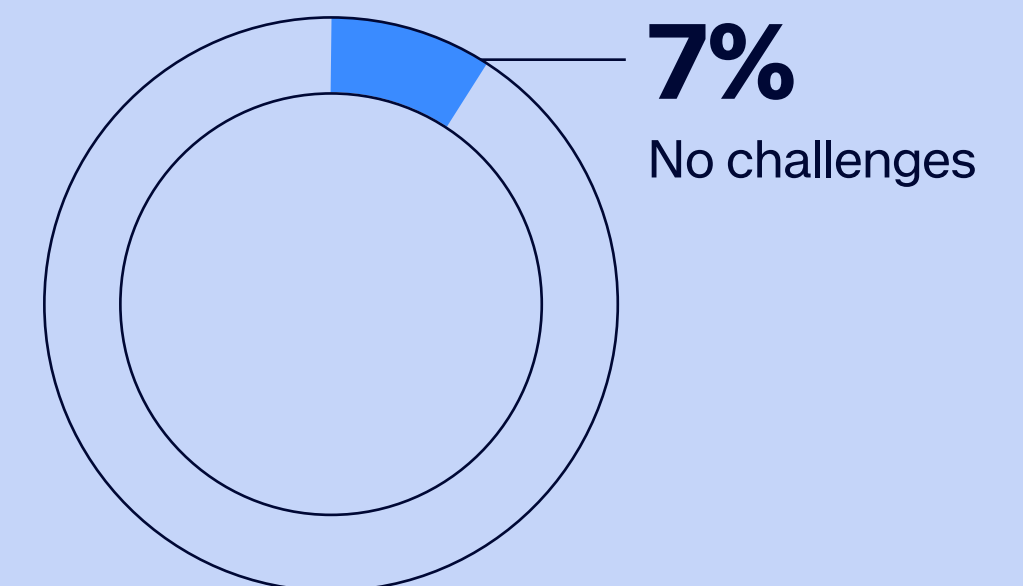
Regionally,

- **Cost** is a top issue in North America (31%) and Latin America (38%)
- Europe struggles with **language** (32%) and **queues** (24%)
- And Asia Pacific travelers report that the highest barrier is linked to **language** (40%).

## Top challenges overall:



## Only 7% reported no challenges



“Unexpected costs and unclear information remain some of the biggest pain points in car rental. As a global franchise network, consistency is both our challenge and our responsibility. Our focus has been on giving travellers clarity and control before they arrive — through transparent product tiers, digital pre-registration and online check-in — so key decisions around coverage, deposits and terms are made upfront. Reducing friction at the counter and setting clear expectations throughout the journey is essential to rebuilding trust and improving the overall mobility experience.”

**Chay Lowden**

Chief Product Officer, Green  
Motion & U-Save International



# How Amadeus Mobility addresses traveler challenges

The Amadeus Mobility platform is designed to help overcome many of these common travel pain points by empowering both travel sellers - and hence travelers - with comprehensive, real-time information. The platform provides complete visibility into availability and transparent pricing, including detailed car rental location information and clear pick-up instructions. This helps travelers make informed decisions, reducing uncertainty and the risk of unexpected costs.

Travel sellers benefit from live updates about changes and modifications during the trip, enabling them to deliver better support and timely information to their customers. By facilitating smoother payment processes and offering convenient options such as online check-in or the ability to skip the counter, Amadeus Mobility helps minimize queues and waiting times at pick-up locations. These digital solutions not only streamline the travel experience but also directly address key pain points—like language barriers, unreliable information, and long waits—ultimately leading to higher traveler satisfaction and a more seamless journey.

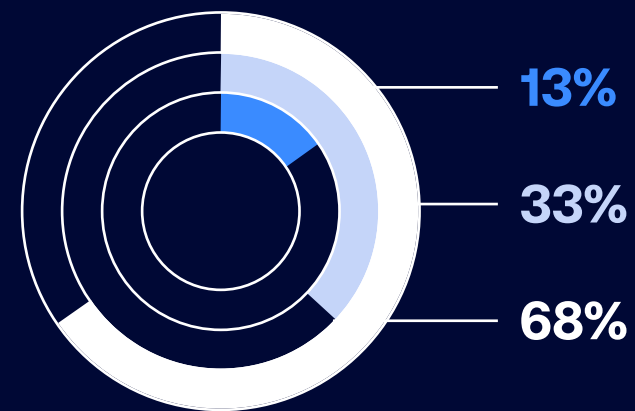
# Embracing digital solutions and AI in travel

The travel industry is undergoing a significant transformation driven by digital innovation and AI-powered tools.



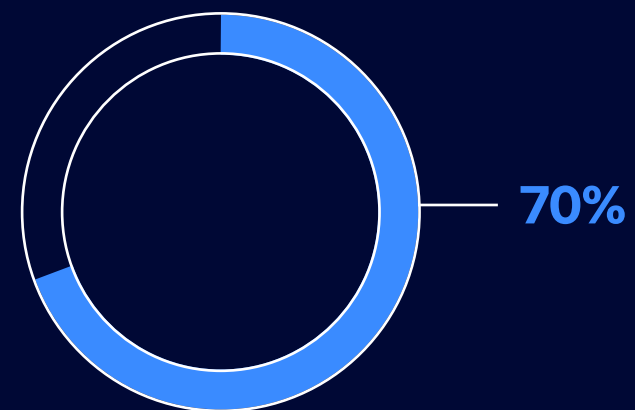
## What about AI?:

There is an overall interest of using AI:



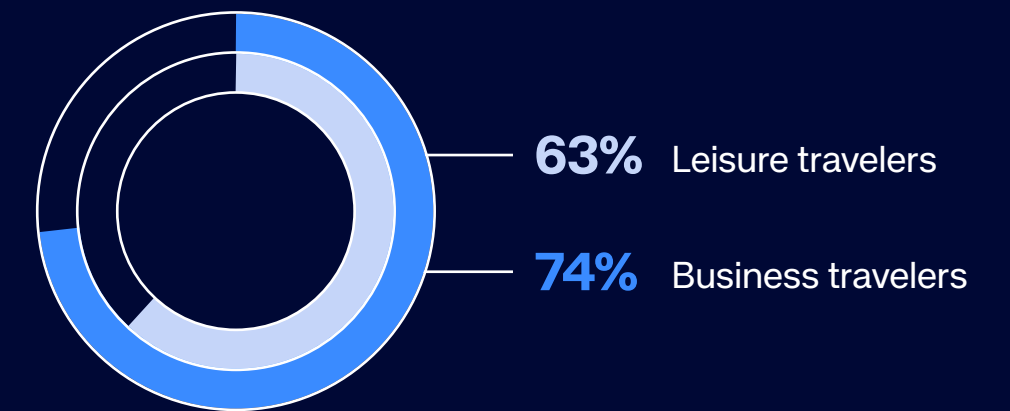
68% of travelers are 'likely' to use an AI-powered travel assistant app; 33% are 'very likely' to do so, while only 13% are 'unlikely'.

## Regional enthusiasm:



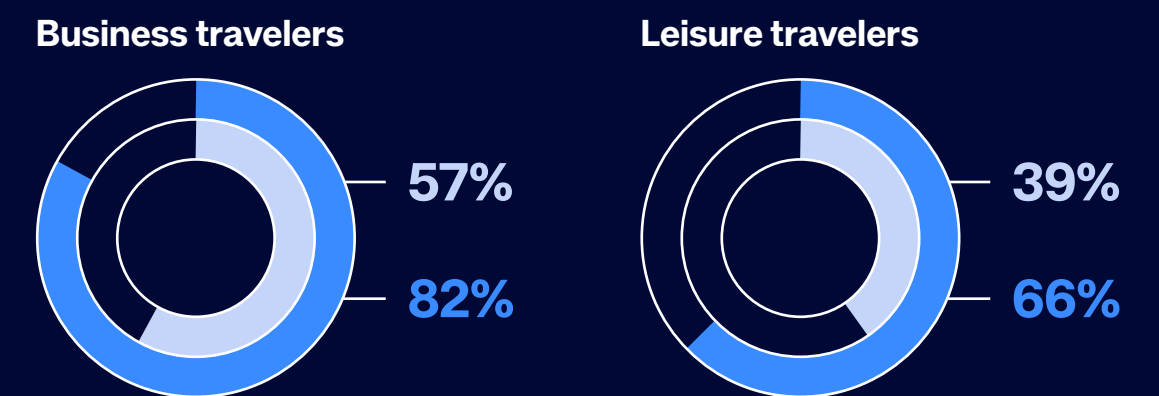
Over 70% of travelers in North America and Latin America are 'likely' to use digital travel assistants; Europe is above average, and North America also shows majority interest.

Traveler type:



74% of business travelers are 'likely' (of which 42% are 'very likely') to use such an app compared to 63% of leisure travelers (of which 25% are 'very likely').

## Car hire frequency:

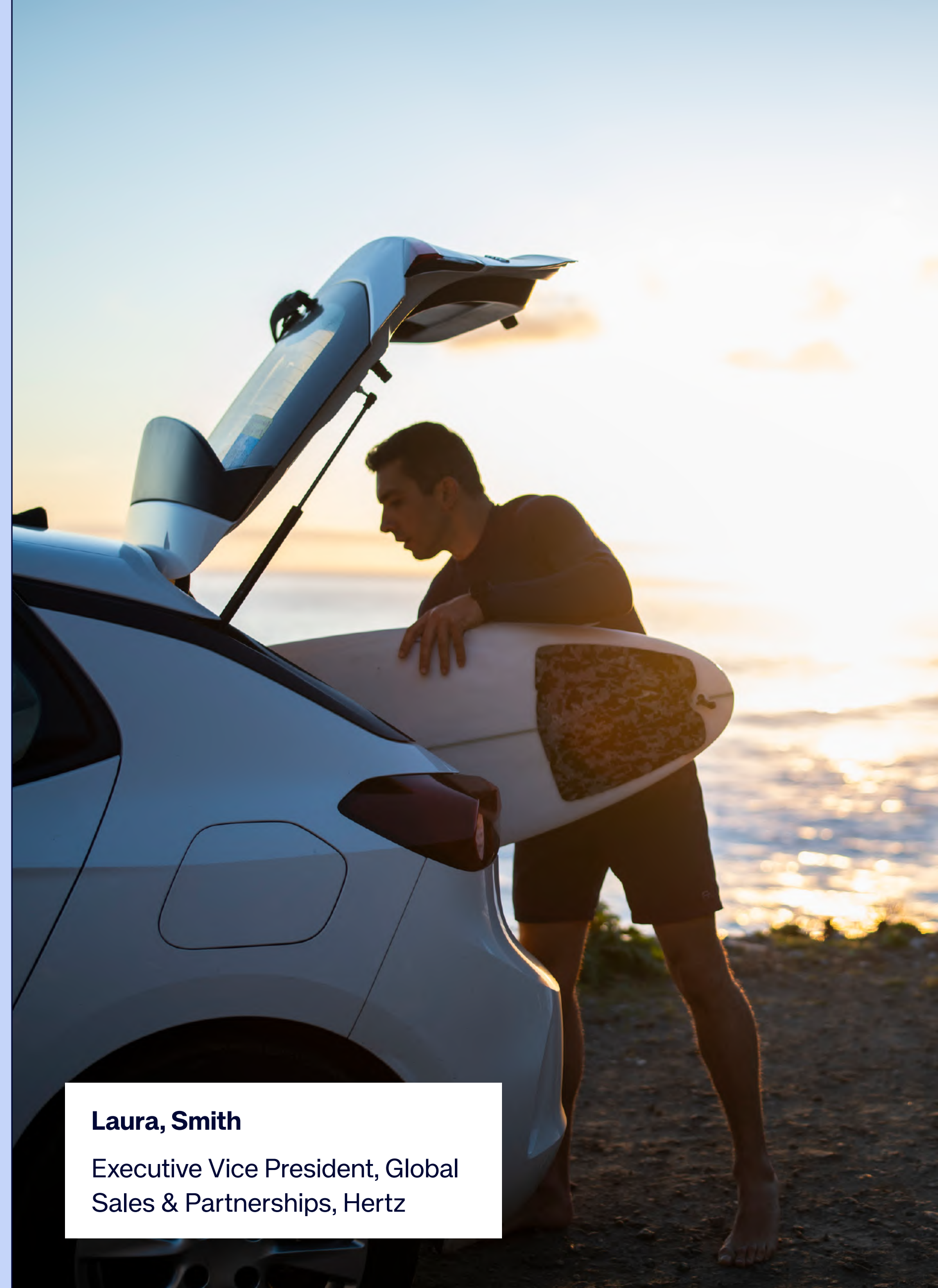


Among frequent business car renters (6+ times/year), 82% are 'likely' and 57% are 'very likely' to use such an app. Among frequent leisure travelers car renters, 66% are 'likely' and 39% are 'very likely' to use such an app.

“Seamless digital experiences are table stakes, and we’re investing to meet travelers with the easier, faster interactions we know they want. We’re enhancing our platform to improve self-service convenience, and our award-winning Hertz Gold+ loyalty program lets members skip the counter and go straight to their car, adding ease at the moments that matter most.

We’re leveraging AI across the business to drive speed, consistency, and personalization at scale. A great example is that customers told us they wanted more support, but the cost of connecting at scale made that impossible. AI agents changed the equation. In less than a year, our AI agent now resolves three out of four customer inquiries and supports half of all phone interactions, delivering faster service and more consistent support while freeing live agents for complex needs. We’re excited about the potential to keep raising the bar for our customers. Our goal is for the Hertz experience to feel seamless, and to provide immediate, proactive support exactly when and where customers want it.

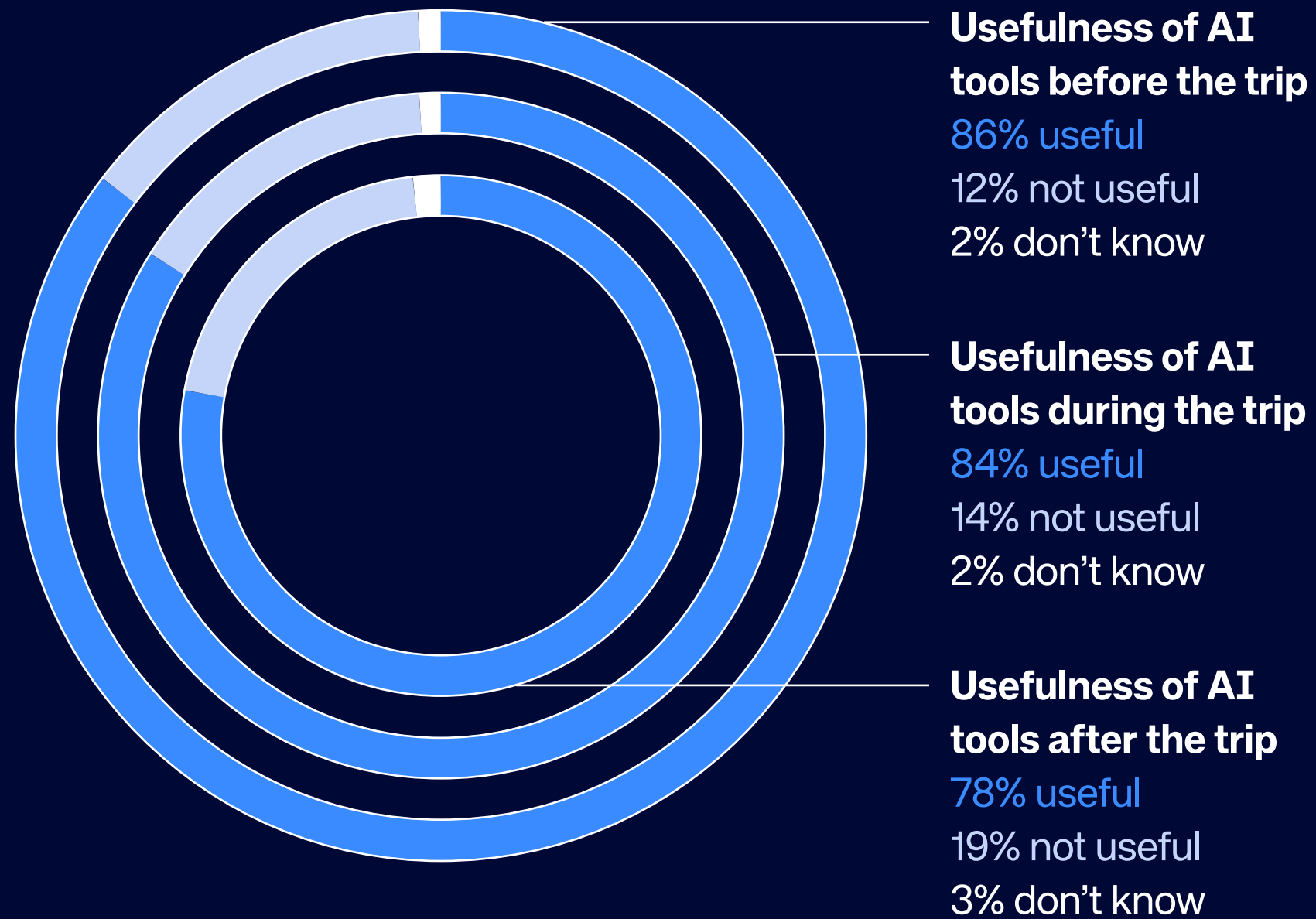
The industry is moving toward a world where mobility becomes part of an AI-powered travel ecosystem. Travelers could book, modify, and manage rentals through whatever assistant they choose, receiving alerts, instant vehicle support, and seamless loyalty recognition across platforms. The winners will be brands that integrate deeply enough to meet customers where they are with the booking experience that’s right for them.”



**Laura, Smith**

Executive Vice President, Global  
Sales & Partnerships, Hertz

# Usefulness of AI tools throughout the travel journey



■ Useful  
■ Not useful  
■ Don't know



Over 80% of respondents value AI tools for personalized recommendations before and during travel, and nearly 80% appreciate post-trip support like loyalty offers. These technologies enable providers to tackle common travel issues, making journeys more efficient and personalized.

Across all stages of travel—planning, traveling, and post-trip—AI personalization is not just a nice-to-have; it's becoming a competitive differentiator. By leveraging AI to deliver context-aware recommendations, real-time updates, and loyalty-driven offers, travel providers can meet evolving expectations, deepen engagement, and unlock new revenue streams.



“AI is reshaping traveler expectations faster than any other trend in this report. With more than two-thirds of travelers surveyed reporting they are willing to use an AI-powered travel assistant, the travel industry must embrace this. At Amadeus Mobility, we see this as a call to action: to deliver technology that not only responds to traveler needs but anticipates them. Throughout the entire trip, hyper-personalization and real-time accuracy are no longer optional; they are expected. We need to focus on delivering smarter, real-time mobility intelligence — so that every recommendation, every update, every mobility booking feels tailored and intuitive.”

**Peter Altmann**

Vice President Mobility and  
Travel Protection, Amadeus

# Services that would improve the car rental experience

## Top services overall:



Online check-in  
**40%**



Personalized route recommendations  
**29%**



Real-time travel disruption alerts  
**29%**



Skip-the-counter:  
**28%**



Unified ticketing  
**25%**



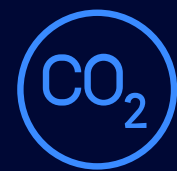
Fast last-mile transport  
**24%**



Travel concierge/AI support  
**22%**



Fully contactless experience  
**19%**



Transport with carbon tracking  
**17%**

## Leisure vs business travelers:

■ Business ■ Leisure

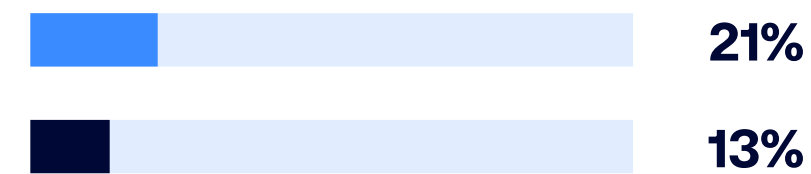
### Skip-the-counter



### Personalized routes

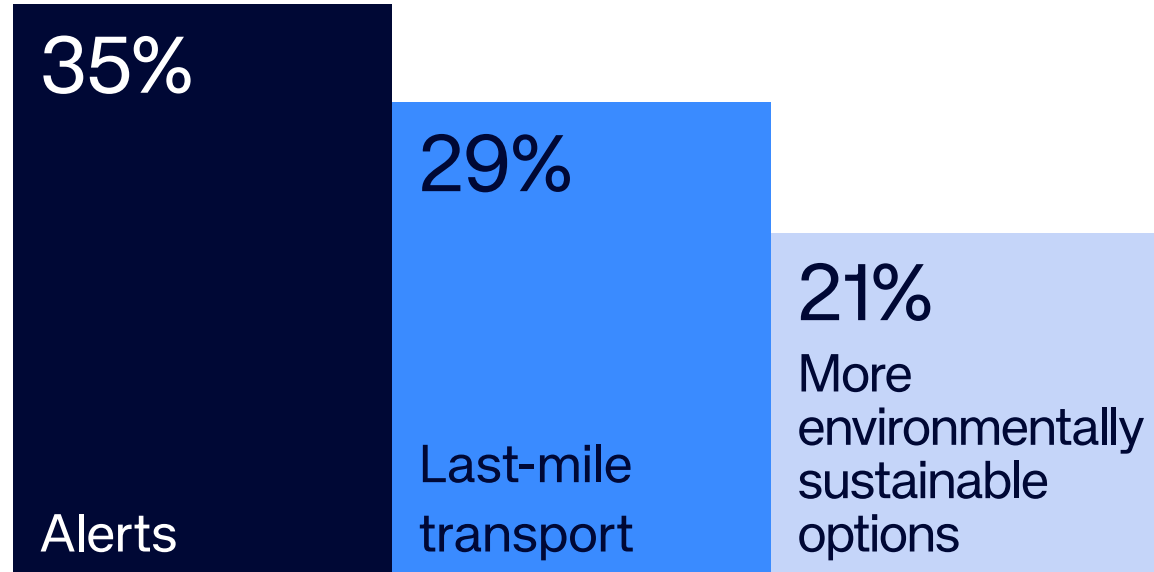


### More environmentally sustainable options

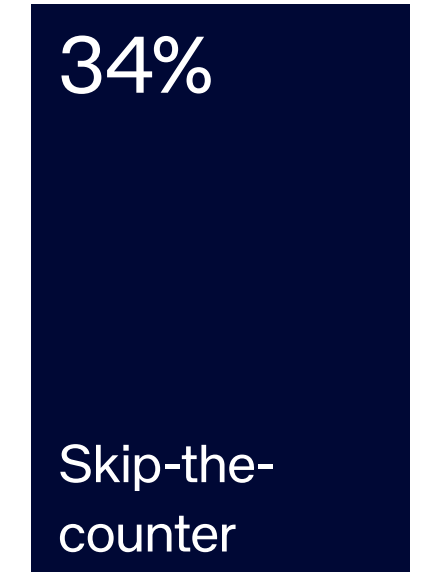


## Generational trends:

### Gen Z:

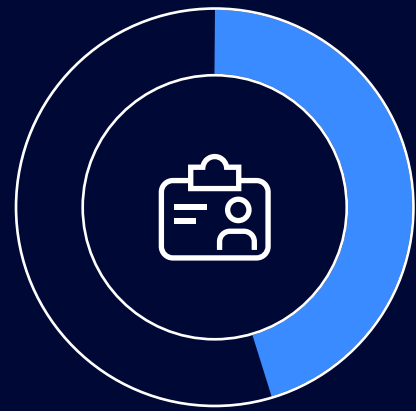


### Boomers:

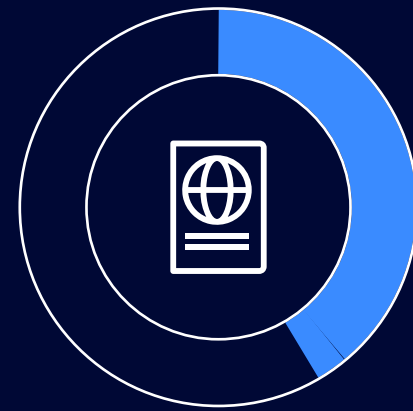


The latest findings highlight that travelers across all regions and segments are looking for greater digital convenience, seamless integration, and personalization in their journeys. The data suggests that travel providers can enhance the customer experience by focusing on digital convenience, integrating services, and tailoring solutions to the unique preferences of each traveler segment and region.

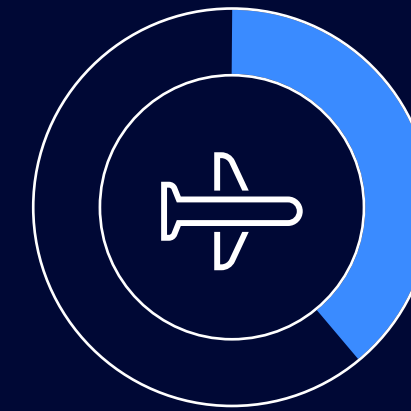
## Willingness to share data:



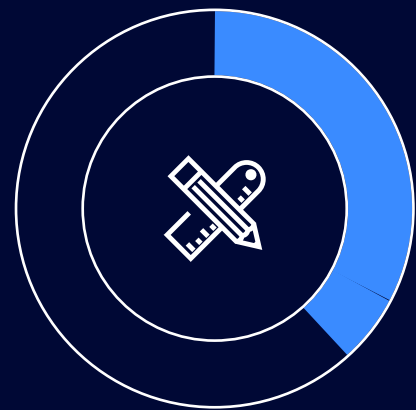
**Driver's licence details:**  
47% are willing to share these details in advance to speed up car rental.



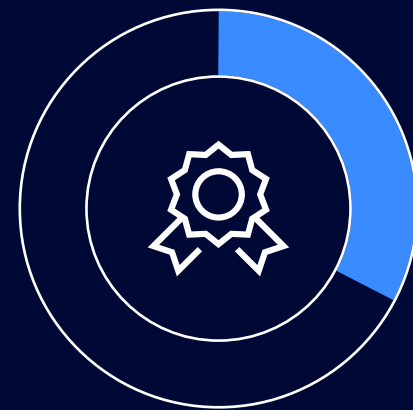
**Trip details (e.g. flight or hotel info):**  
42% are comfortable sharing.



**Passport or ID information:**  
40% are comfortable sharing.



**Personal preferences (e.g., vehicle type, music, climate settings):**  
38% are open to sharing.

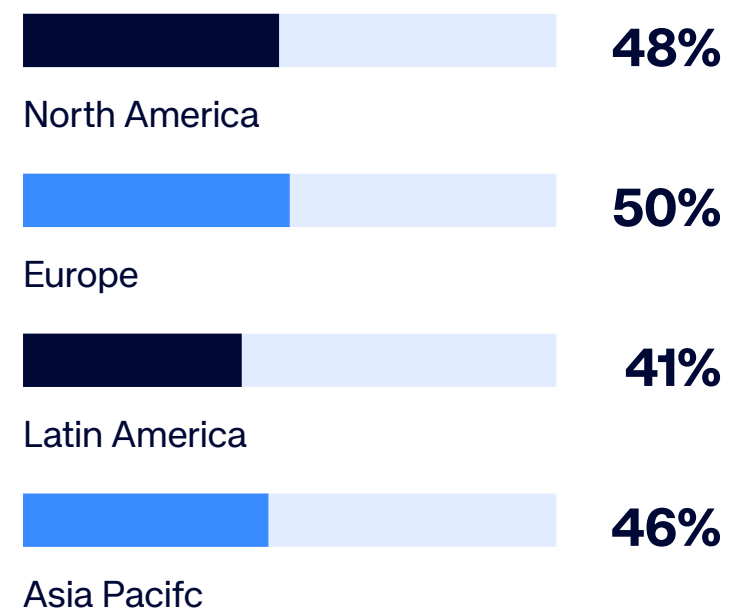


**Loyalty program or membership information:**  
33% are open to sharing for a more personalized experience.

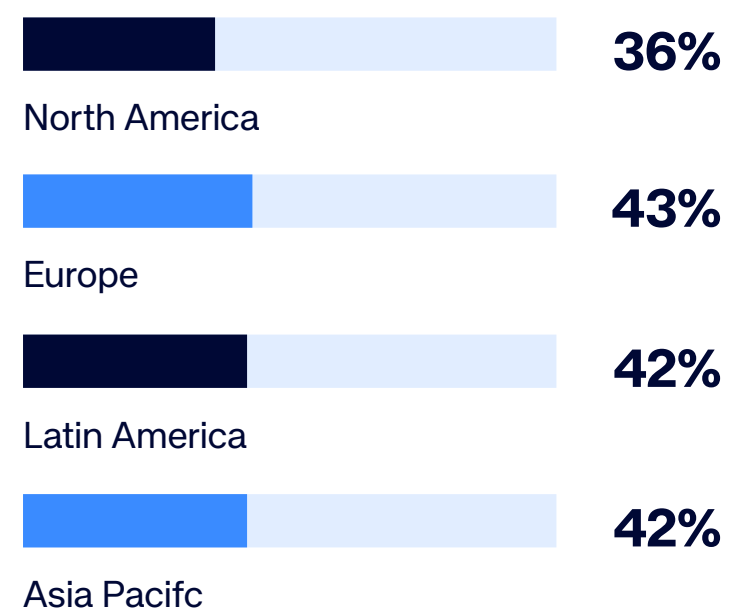


Data sharing and personalization are increasingly pivotal in shaping seamless, tailored travel experiences. These attitudes also vary by region, where generally speaking Asia Pacific travelers are more cautious. European travelers are more inclined to share driver's license details and passport or ID information. Latin America travelers are more willing to share trip details, personal preferences and biometric data than other regions. Finally, North American travelers are most in favor of sharing loyalty program or membership information.

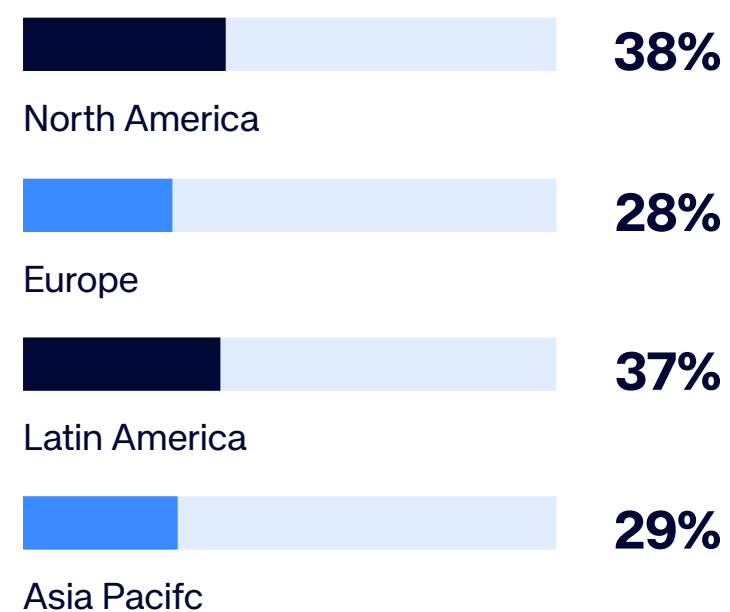
### Driver's license details



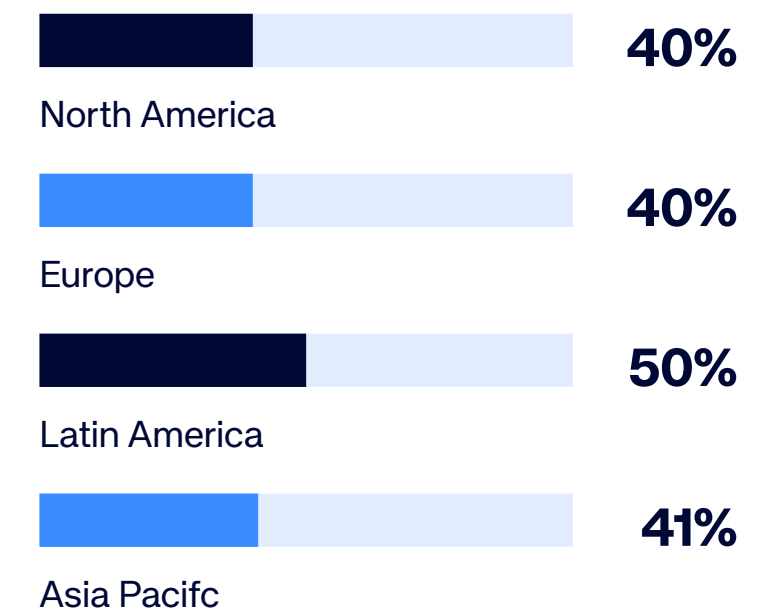
### Passport or ID information



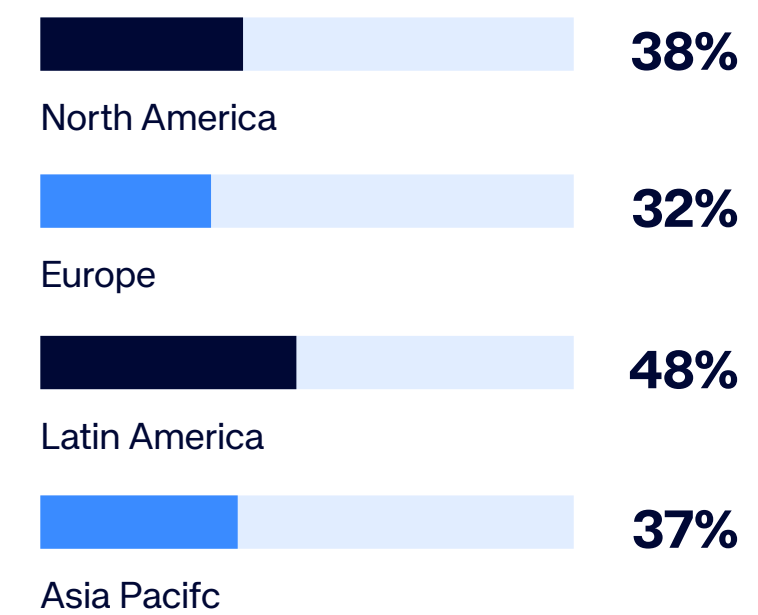
### Loyalty program or membership information



### Trip details (e.g., flight or hotel info)



### Personal preferences (e.g., vehicle type, music, climate settings)



“Privacy and personalization are interdependent, not competing goals, and transparency is what builds trust. We tell customers exactly why we’re asking for information and how it will make their travel smoother. When travelers share flight details, we use that data to automatically track delays and hold their airport rental, ensuring their car waits for them even if they’re late. It’s a clear exchange: they share a little information, and we remove a lot of stress.”

**Laura Smith**

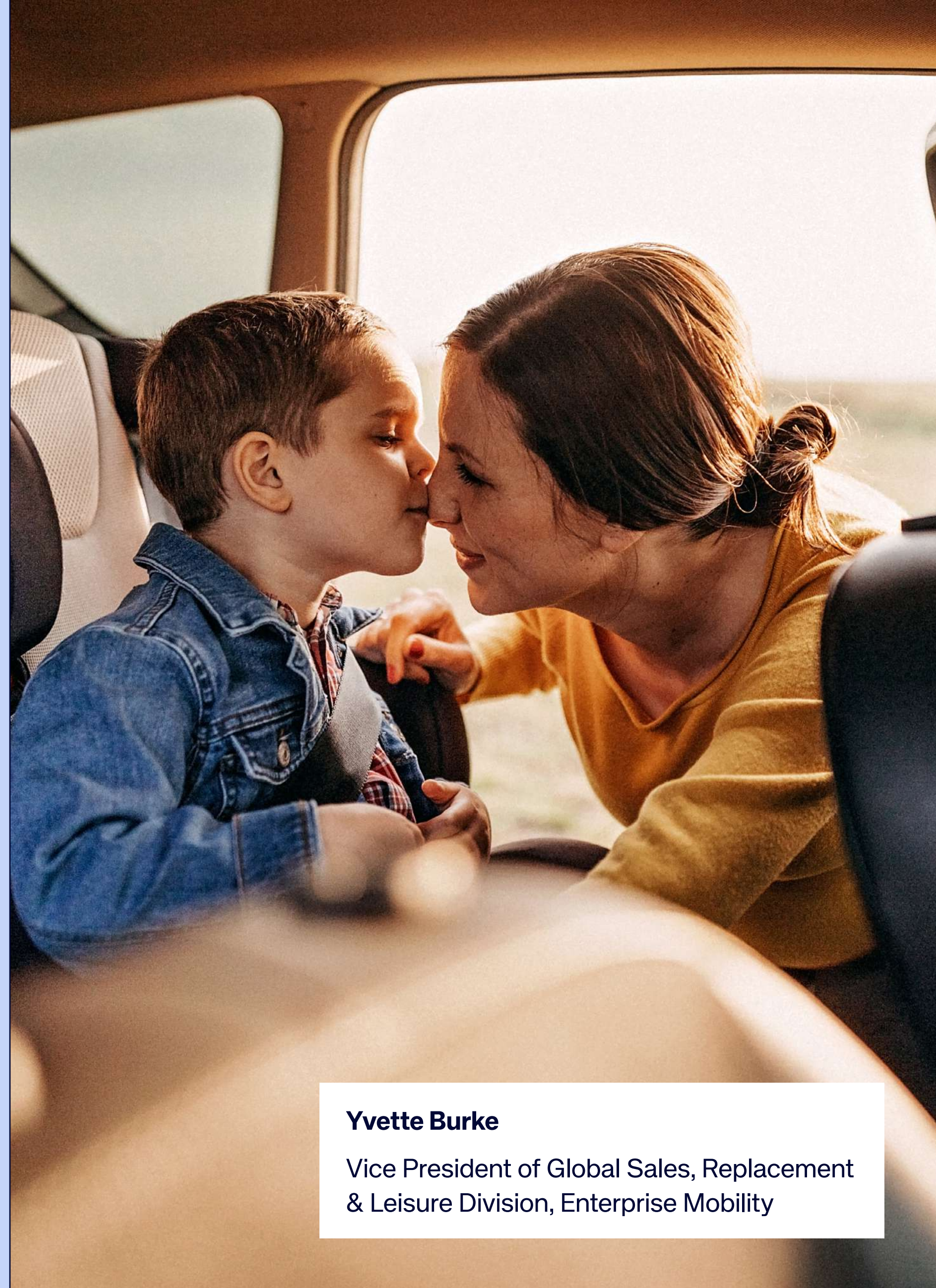
Executive Vice President, Global  
Sales & Partnerships, Hertz





The in-trip phase is a dynamic period where the quality of digital tools, real-time information, and integrated mobility solutions can make or break the traveler experience. While pre-trip planning sets expectations, it is during the trip that flexibility, support, and seamless service delivery become essential. Addressing pain points such as language barriers, cost transparency, and information reliability—while investing in digital, personalized, and contactless solutions—will be key for providers aiming to exceed traveler expectations and build loyalty.

“Building trust is central to our vision of being the world’s most trusted mobility company, and that trust depends on how responsibly we handle personal information. At Enterprise Mobility, safeguarding data is a shared responsibility, and we honor the confidence customers and employees place in us by treating all information with care. We use data to enhance the customer experience while remaining transparent about what we collect, how we use it and when we share it – empowering customers with meaningful choices and controls.”



**Yvette Burke**

Vice President of Global Sales, Replacement  
& Leisure Division, Enterprise Mobility

# Post-trip and loyalty engagement

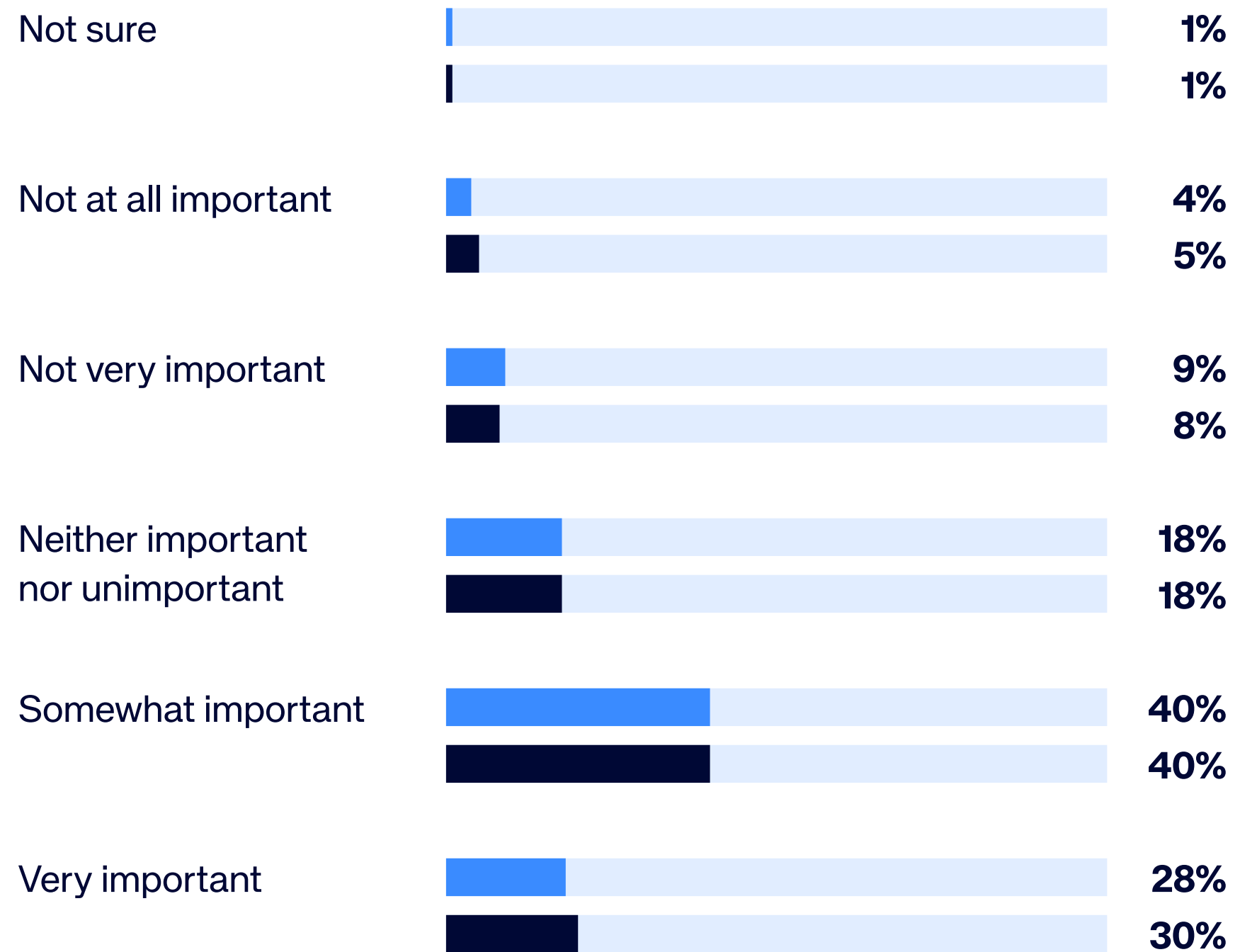
The post-trip phase is a crucial, yet often overlooked, part of the traveler journey. It is during this period that experiences are reflected upon, feedback is shared, and loyalty is either strengthened or lost. Understanding what motivates travelers in order to engage with them after their trip, and understanding how they perceive new mobility solutions, provides valuable guidance for providers aiming to foster long-term relationships and drive innovation in the mobility sector.



## Loyalty programs: A key differentiator in mobility

■ Transfer ■ Car rental

### Why loyalty matters:



Nearly 7 in 10 travelers consider loyalty programs important when choosing a car rental or transfer provider—69% for car rental and 68% for transfers. Loyalty provides a clear opportunity to differentiate for providers.

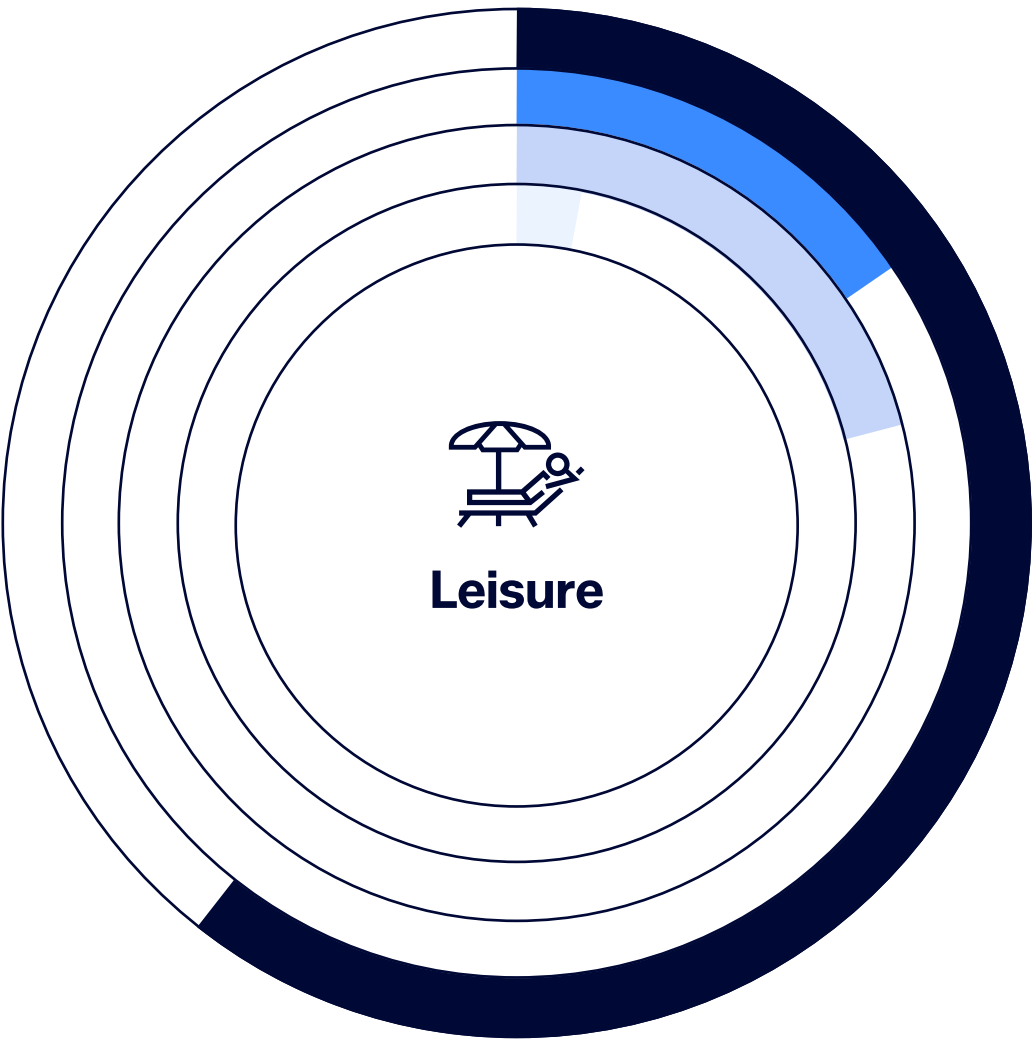


**Who values loyalty most when it comes to car rental:**

Business travelers and frequent renters (6+ times/year) are most likely to rate loyalty as 'very important'.



- **78%** Important
- **9%** Not important
- **13%** Neither important nor unimportant
- **0%** Not sure

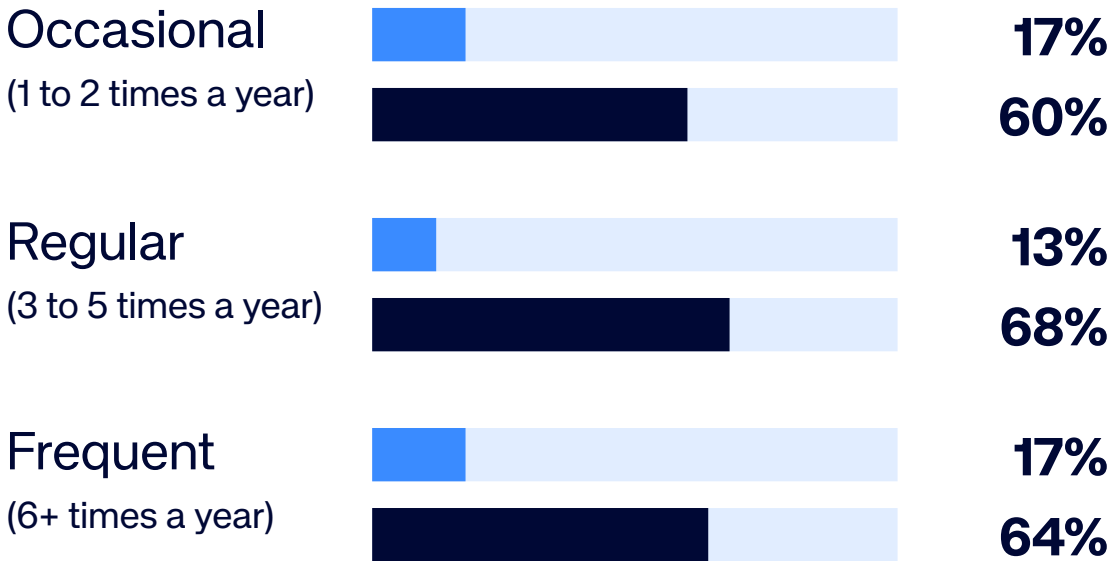
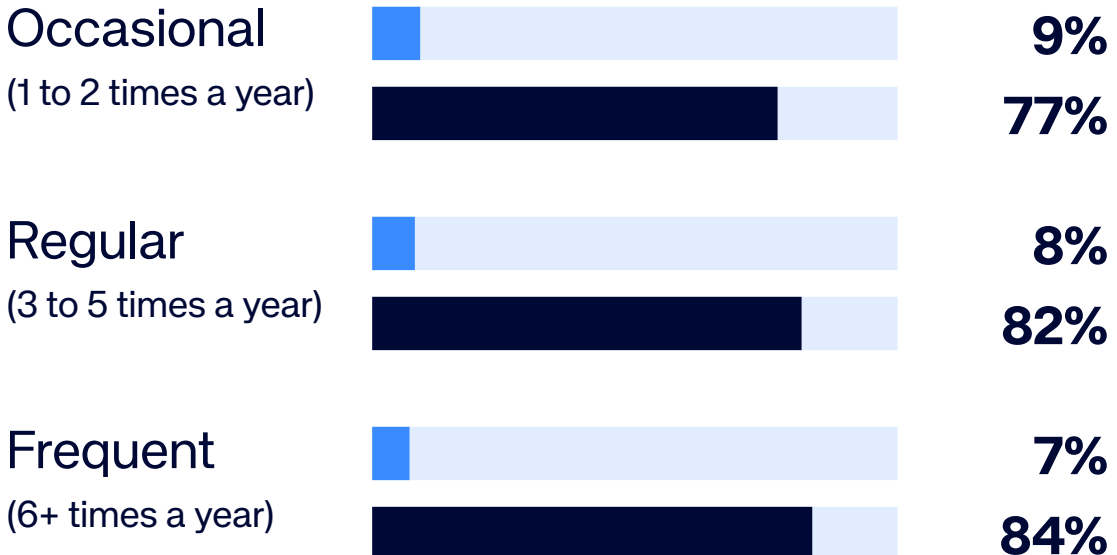


- **61%** Important
- **16%** Not important
- **22%** Neither important nor unimportant
- **1%** Not sure

**How important are loyalty programs in choosing your car rental provider?:**

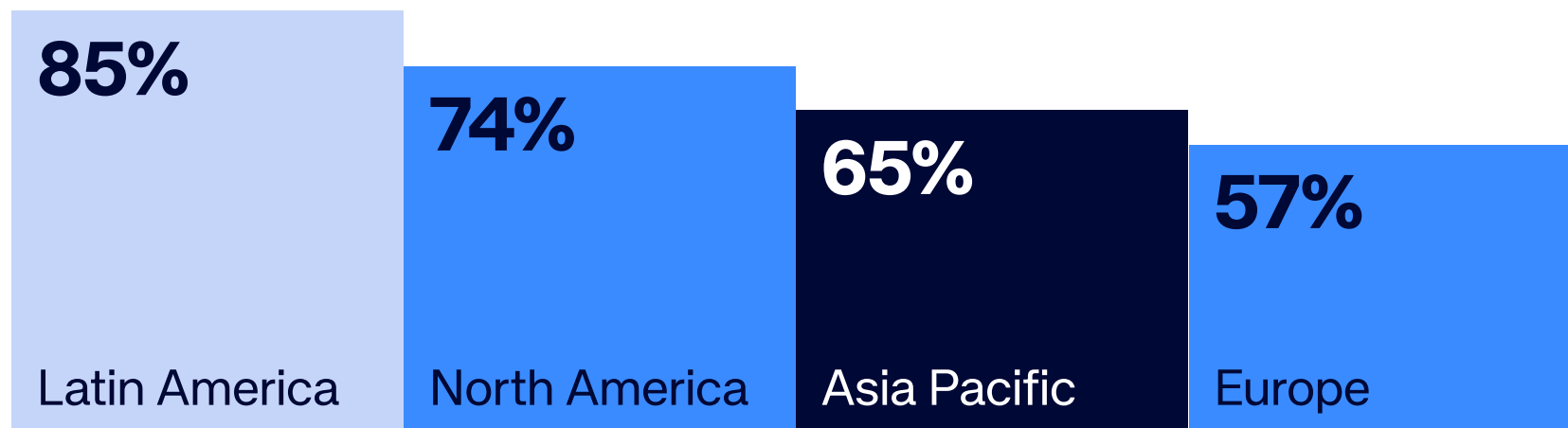
Business and leisure car hire frequency

■ Not important  
■ Important



The more frequently travelers rent a car, the more likely they are to care about loyalty. This is the case for both leisure and business travel, but results are even stronger for business travelers.

Regionally, Latin America leads globally in loyalty importance, followed by North America. Asia Pacific shows moderate interest, with Europe being the least loyalty-driven.



## Mobility loyalty (car rental and transfers): what travelers want

Among those who value loyalty, the most desired features are:



Real-time offers and promotions during travel

**47%**



Personalized rewards based on travel behavior

**37%**



Seamless point redemption across transport modes

**34%**



Exclusive experiences or VIP treatment

**32%**



Priority access to new services and technologies

**31%**



Sustainability-focused rewards

**26%**



Gamification (challenges, badges)

**14%**





“Loyalty today isn’t just points on a card—it’s an experience that understands you in real time: offers when you need them, rewards that reflect your behavior, and extras that make you feel valued.”

**Peter Altmann**

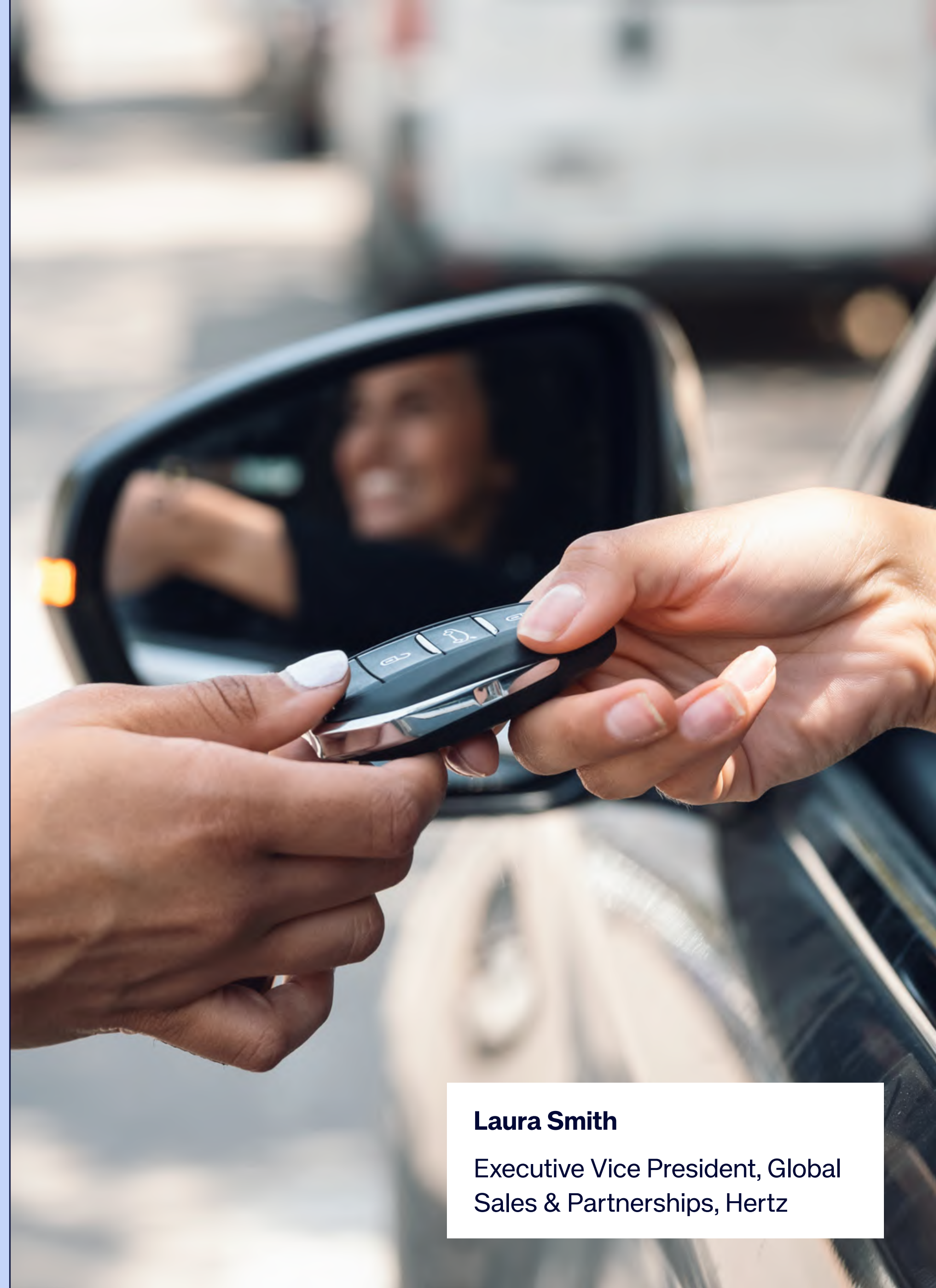
Vice President Mobility and  
Travel Protection, Amadeus

Loyalty is not just about points. Travelers expect real-time, personalized, and flexible rewards that fit their journey and differentiate through integration and exclusivity. Cross-modal redemption, VIP experiences, and early access to new tech can set providers apart.

“Loyalty today is a relationship strategy, not a points engine: it needs to recognize customers, reduce friction, and reward them in the moments that matter across the entire journey. Our refreshed Hertz Gold+ program signals this shift toward a more premium, personalized experience where membership feels valuable on every rental, not just at redemption.

We use real-time decisioning to tailor vehicle choice and upgrade offers based on live inventory, trip timing, and member tier, testing rigorously to prove impact before we scale.

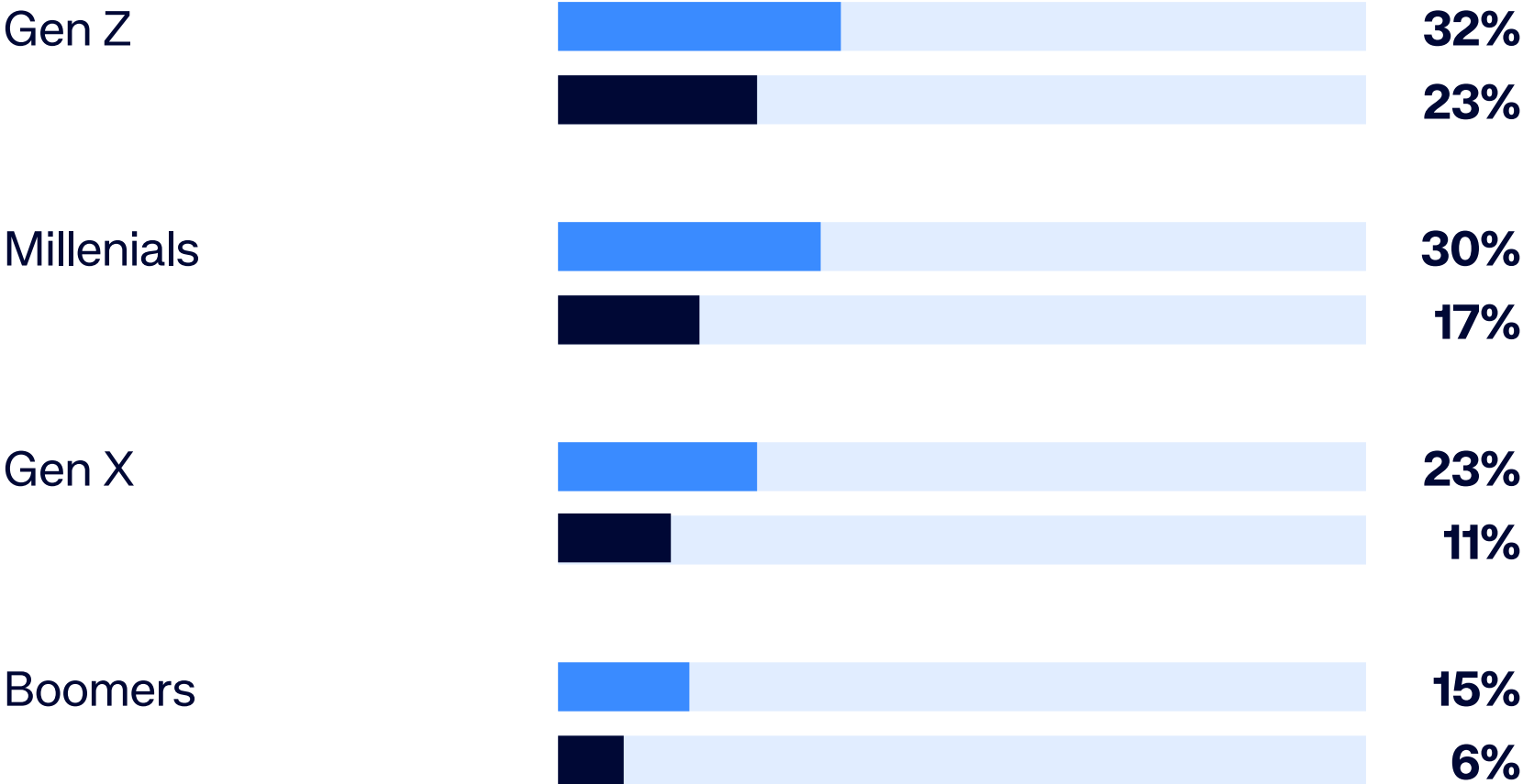
And we extend loyalty beyond car rental through credit card, auto, and travel-sector partnerships, creating multiple pathways for customers to earn status and unlock benefits across their full travel journey. Cross-modal loyalty works when it clearly adds value: enhancing recognition, reducing friction, and strengthening our role in the travel ecosystem without adding complexity.”




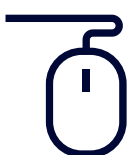
**Laura Smith**

Executive Vice President, Global Sales & Partnerships, Hertz

Generationally, what’s interesting to note is that younger generations have shown greater interest than older generations in sustainability-focused rewards and gamification elements.



 Sustainability-focused rewards (e.g., green miles, carbon offset credits)

 Gamification elements (e.g., challenges, badges)

Travelers increasingly expect loyalty programs to offer immediate, personalized benefits—such as real-time offers, tailored rewards, and seamless point redemption across transport modes. These trends highlight a shift toward more dynamic, integrated, and meaningful loyalty experiences that set providers apart in a competitive market.

The Amadeus Mobility Platform is transforming the industry by providing new retailing capabilities to travel sellers and providers. Travel sellers can implement loyalty programs with mobility providers, ensuring their travelers receive extra benefits when booking through them. Additionally, travelers can use their loyalty numbers so mobility providers are aware of their status and can propose customized offers via the Mobility Platform—such as better rates, additional services included, or even opportunities to earn more points. This integrated approach not only personalizes the post-trip experience but also strengthens traveler loyalty and engagement.





“Loyalty is a critical part of supporting and empowering customers. Our loyalty programs, Enterprise Plus and Emerald Club (one of the first loyalty programs in the industry), are about much more than cost savings – they’re about doing right by customers so they can make the most of the available perks while providing choice and convenience as they travel. By leveraging data and personalization, we are reducing friction across the rental journey and giving customers greater control over their experience, while enabling teams to serve more efficiently. Cross-modal loyalty is also a key part of our strategy. We partner with other leading travel providers to expand the ways customers can earn and redeem rewards across their journeys – whether they are booking cars with us, using a partner credit card, or making flight and hotel reservations.”

**Yvette Burke**

Vice President of Global Sales, Replacement & Leisure Division, Enterprise Mobility

## Motivators for sharing reviews

Understanding what drives travelers to share feedback on their car rental experiences reveals key strategies for increasing customer engagement and satisfaction.

### Why would travelers leave a review:

**41%**

Discounts on future rentals

**41%**

Loyalty rewards

**36%**

Helping other travelers with my experience

**34%**

Feeling that my opinion is valued by the provider

**32%**

Knowing my feedback will be followed up on

**31%**

Better personalization on future bookings

**6%**

Nothing - I do not leave reviews, regardless of incentives

## Personalization remains king

The leading motivators for leaving a review about a car rental experience are discounts on future rentals and loyalty rewards. So to get engagement, travelers would expect incentives in return. 31% would be motivated to leave a review if it led to more personalized offers or experiences in the future.

Millennials are more influenced than other generations by:

**34%**

Personalization

**36%**

The desire to help others

**50%**

Latin America is the region where travelers are the most motivated to share a review for various reasons, but most importantly, for loyalty rewards



By leveraging targeted incentives and personalized approaches that resonate with different traveler segments, providers can not only boost review participation but also strengthen long-term loyalty and trust.

# Openness to new mobility solutions

Around half of respondents would consider using future mobility solutions, emerging transport solutions and digital innovation that are reshaping how travelers move within and between destinations. Key examples include:

58%

## Smart infrastructure (connected traffic systems & real-time curb access)

Digitally enabled transport infrastructure that uses real-time data to optimize traffic flow, manage curbside access, and reduce congestion. This includes connected traffic lights, dynamic curb allocation for pick-up and drop-off, and integration with mobility platforms.

58%

## Electric and hybrid rental fleets

Vehicle fleets powered fully or partially by electricity, designed to reduce CO<sub>2</sub> emissions and reliance on fossil fuels. These fleets increasingly form the backbone of sustainable ground transportation, particularly for urban and airport mobility.

56%

## Mobility-as-a-Service (MaaS) platforms

Integrated digital platforms that bring together multiple transport modes—such as public transit, car rental, ride-hailing, and micromobility—into a single interface, enabling travelers to plan, book, and pay for end-to-end journeys seamlessly.

52%

## Hyperloop and ultra-high-speed ground transport

Next-generation ground transport systems designed to move passengers at extremely high speeds using low-friction or vacuum-based technologies, significantly reducing travel time between major hubs.

49%

## On-demand ride pooling

Shared mobility services that dynamically match multiple passengers traveling in similar directions into a single vehicle, improving vehicle utilization, lowering costs, and reducing overall traffic and emissions.

48%

## Autonomous vehicles

Vehicles capable of navigating and operating with reduced or no human intervention, using sensors, AI, and advanced software. In mobility ecosystems, these are expected to transform both personal travel and shared transport services.

45%

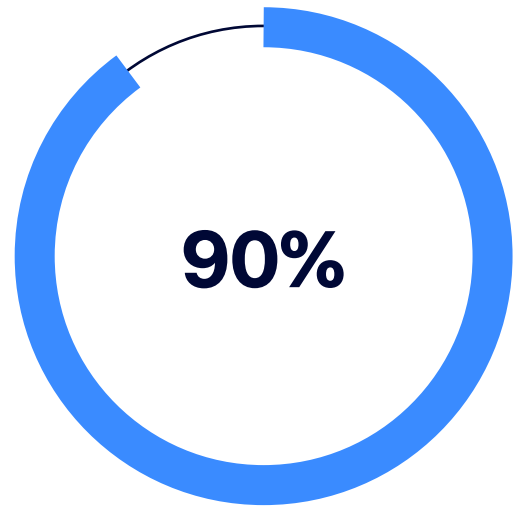
## Drone taxis (urban air mobility)

Electric vertical take-off and landing (eVTOL) aircraft designed for short-distance passenger transport, particularly in dense urban environments. These solutions aim to complement ground mobility by reducing travel time for specific routes.

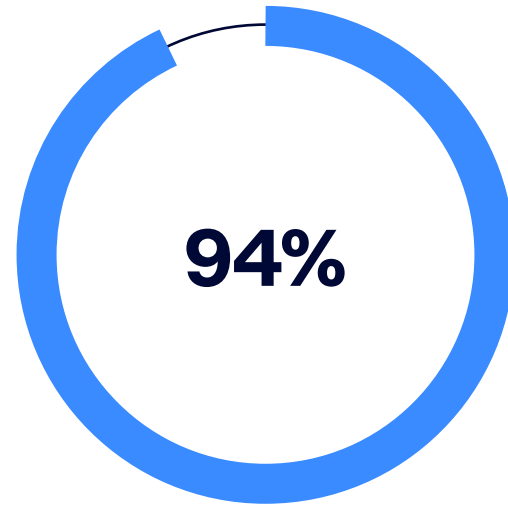




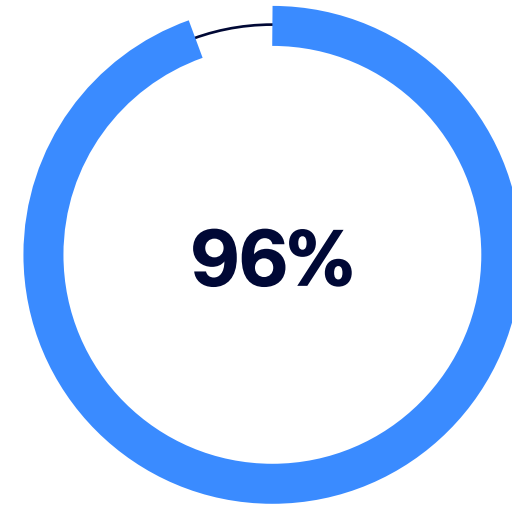
Who is most open and more likely to consider new mobility solutions:



Business travelers



Gen Z travelers



Business travelers who hire a vehicle frequently

Top 3 new mobility solutions from a regional perspective:

**Latin America**

- MaaS
- Electric or hybrid rental fleet
- Smart infrastructure

**Europe**

- Electric or hybrid rental fleet
- Smart infrastructure
- MaaS

**North America**

- MaaS
- Smart infrastructure
- Hyperloop

**Asia Pacific**

- MaaS
- Electric or hybrid rental fleet
- Smart infrastructure


The post-trip phase offers significant opportunities for mobility providers to build loyalty and gather actionable feedback.

Incentivizing reviews through discounts and loyalty rewards, while ensuring travelers feel heard and valued, can drive higher engagement and repeat business. Furthermore, the strong interest in new mobility solutions—especially among younger and frequent travelers—signals a market ready for innovation, provided that concerns around safety, trust, and sustainability are addressed.

By focusing on post-trip engagement and embracing emerging innovations, providers can differentiate themselves and foster lasting relationships with their customers.



Conclusion



“The paradox of modern travel is that we’re more connected than ever, yet friction persists. The industry needs to harness integration, personalization, AI, and sustainable practices to erase those frictions—making mobility but also the end-to-end travel journey, effortless and human.”

**Peter Altmann**

Vice President Mobility and Travel Protection, Amadeus

The findings of this report highlight a traveler landscape that is increasingly digital, personalized, and sustainability focused. While convenience and early planning drive satisfaction, persistent challenges such as cost, language barriers, and information gaps remain.

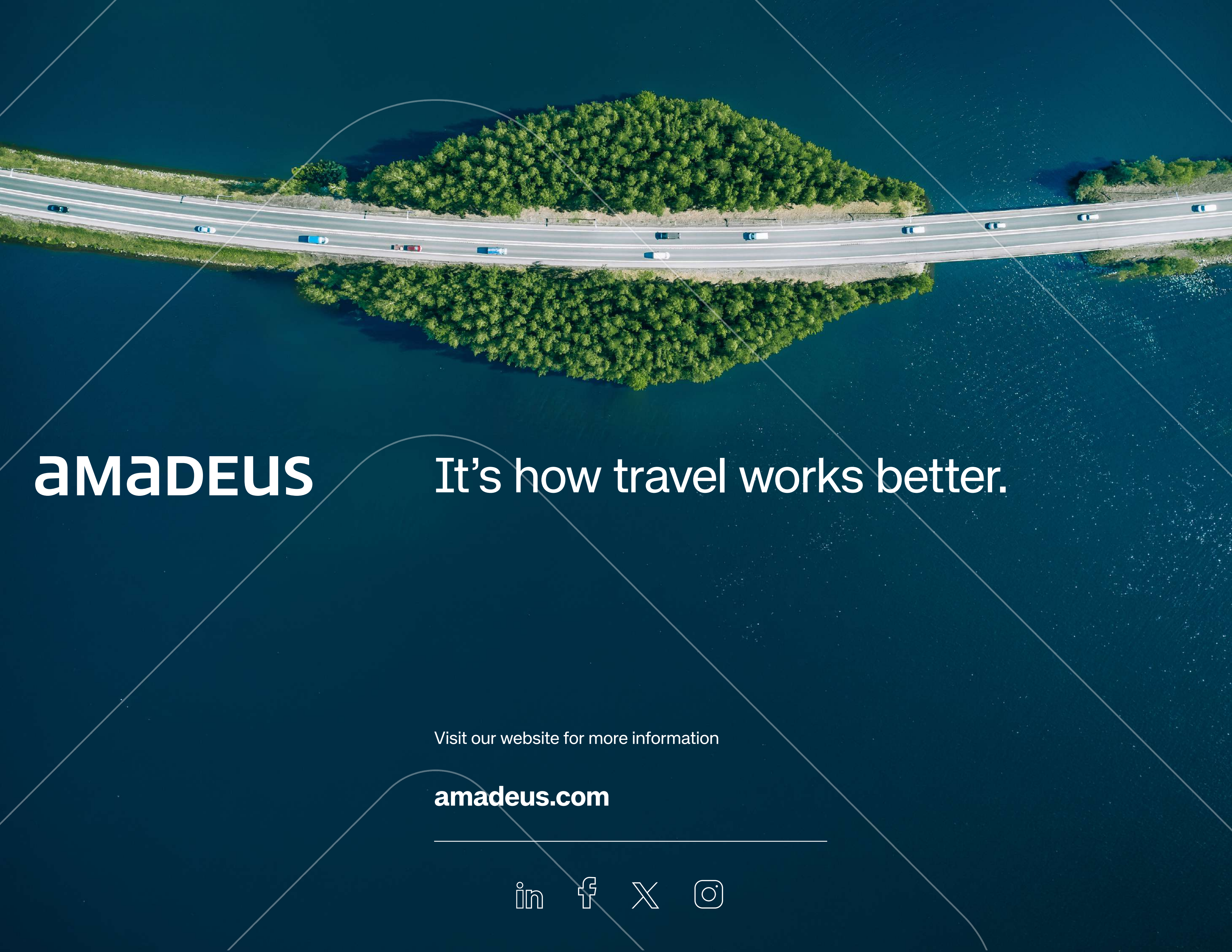
The appetite for integrated mobility solutions, AI-powered tools, and innovative loyalty programs signals a clear direction for industry stakeholders: invest in seamless digital experiences, tailor offerings to diverse traveler segments, and prioritize sustainability to meet evolving expectations. By embracing these trends, travel providers can unlock new opportunities for engagement, loyalty, and growth in a dynamic global market.

While this report focuses on mobility, the forces shaping traveler expectations—digital-first experiences, integration, personalization, sustainability, and trust—are influencing the wider travel ecosystem. Travelers increasingly expect connected, end-to-end journeys rather than isolated services. Amadeus is committed to supporting travelers across the full journey, helping travel players deliver seamless, consistent experiences at every touchpoint.



# Methodology

*Amadeus commissioned strategic insight agency, Opinium Research, to question 3,000 travelers globally in the fourth quarter of 2025. To deliver an industry perspective on the key topics covered in the report, interviews were conducted with executives from Amadeus, Hertz, Enterprise Mobility and Green Motion. The findings presented in this report are based on quantitative survey data and qualitative interviews and are intended for informational purposes only. Unless otherwise stated, references to “travelers” in this report refer solely to survey respondents. Results may not be fully representative of all traveler populations or market conditions and may vary over time. Executive interviews reflect individual perspectives and do not necessarily represent the views of their respective organizations.*



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