Skift RESEARCH + McKinsey & Company

WINNING HEARTS IN AN AGE OF INFINITE TRAVEL CHOICES

TRAVELERS' DISCOVERY AND BOOKING JOURNEYS HAVE BEEN RESHAPED.

How can travel players show up at every turn on the path from search to certainty?

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Introduction

How do travelers plan and book their trips? The answer has changed dramatically in less than a decade.

In 2018, when McKinsey conducted extensive research on the customer journeys of travel consumers, travelers tended to click among search engines, online travel agencies (OTAs), and supplier sites, often returning to the same channels repeatedly before transacting. The path varied in its specifics, but its underlying logic was consistent: develop an intent, narrow the options, secure a booking, and embark on the journey.

Today, the journey before the journey has changed shape. Inspiration is no longer a defined moment that marks the beginning of earnest travel planning. Travel inspiration has instead become part of everyday entertainment—delivered through social feeds, film and television, editorial content, reviews, and AI. Travelers encounter destination ideas continuously. Sometimes they research them. Sometimes they save them and move on. Sometimes they abandon one possible trip for another. Even when they advance all the way to booking, new content, recommendations, and prices can reopen the decision, leaving the itinerary feeling provisional long after the transaction has been confirmed.

The travel customer journey of today might be imagined less as a linear path and more as an orbit. At the inspiration stage, the traveler loosely orbits a vague travel idea—for example, some kind of trip to Japan. As they orbit closer to this idea, they become more specific in their intent (Kyoto, in April, with old college roommates, using credit card rewards points) and more tuned in to associated content (a TikTok post about cherry blossoms, an article about unagi). They might keep moving closer in orbit toward a booking, or they might fall further out of orbit and even leap into a different orbit—say, a vague notion of a trip to Eastern Europe.

In this new customer journey, continuous engagement is a positive signal. Travel is more accessible and more deeply embedded in consumers' lives. But the expanding complexity and scope of travel planning have made the environment more competitive. Destinations, properties, and platforms are competing not only for a click but also for sustained attention as travelers explore and reconsider. Meanwhile, the consumer experience is increasingly fragmented. Travelers move among social platforms, search, AI tools, reviews, OTAs, supplier sites, devices, and conversations, but their context rarely moves with them. Every handoff adds friction: They repeat searches, reconstruct short lists, and revalidate decisions.

Drawing on a new survey of more than 1,000 US travelers—augmented by dozens of self-reported diaries from travelers researching and booking actual trips—this report examines four implications stemming from the new shape of travel planning:

- Always-on inspiration creates more entry points, but trust determines which ideas gain momentum (60 percent of travelers say social media inspires their trip ideas).
- Fragmented research creates a “restart tax,” underscoring why travel players should build for the return visit (half of travelers say their greatest frustration comes when attempting to compare trips across sources).
- AI is advancing faster than operator readiness (71 percent of travelers are comfortable using AI for inspiration today, and 86 percent say they would consider AI bookings in the future).
- Booking confirmation has become a waypoint instead of a finish line, creating openings for active postbooking relationships (half of travelers have changed booked accommodations after seeing a more attractive option).

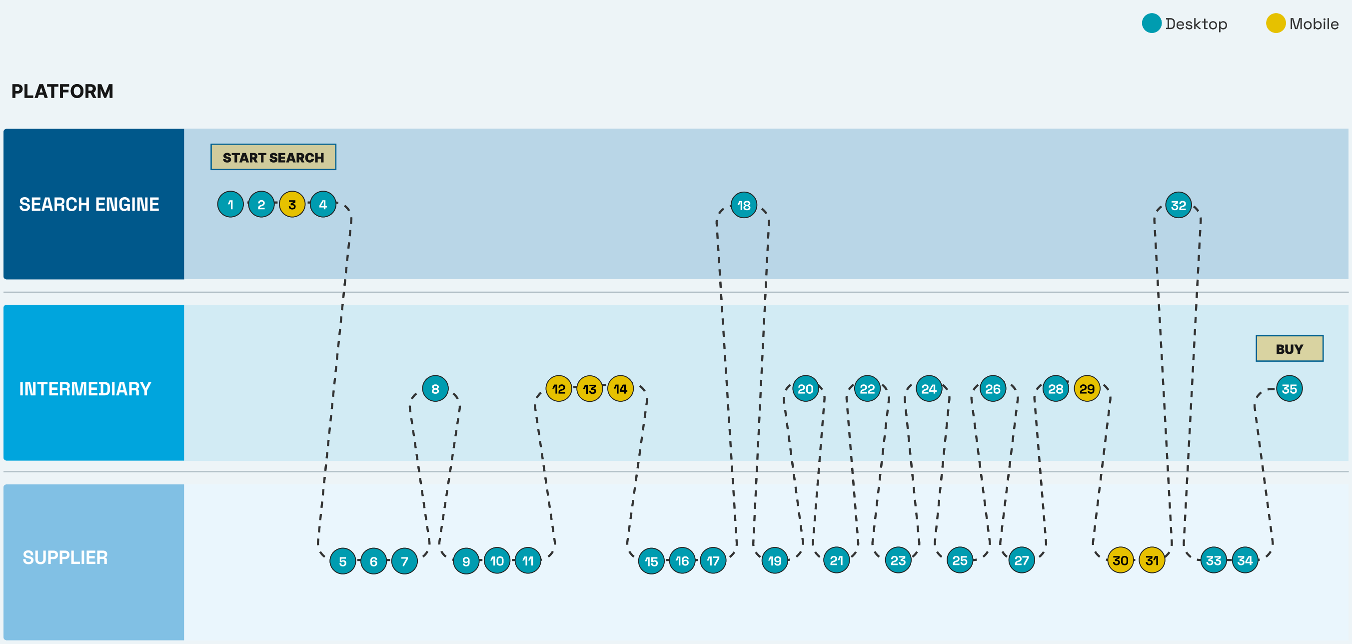
Travel players do not need to win every touchpoint. But they do need to decide where they can credibly earn travelers’ attention, how they will maintain engagement, and which sources of friction they are best positioned to smooth. The opportunity now is to create greater continuity and confidence for travelers—from the first spark of inspiration through booking and beyond. ‹

From a bounded path to a looping orbit: The new travel customer journey

In 2018, McKinsey mapped the digital path to a hotel booking using cross-device clickstream data. On average, the journey lasted roughly 36 days and spanned about 45 touchpoints. Travelers bounced among search, intermediary, and supplier channels before buying. The chart did not show a straight line, but it did indicate a bounded path. The traveler entered with intent and moved, with some zigs and zags, toward a transaction. The chart ended at "buy."

EXHIBIT 1

A typical accommodation-purchase journey in 2018



Source: McKinsey & Company, How to serve today's digital traveler, 2018. Data as of Q1 2018.

In 2026, the number of touchpoints has increased to 65, and the shape of the journey is difficult to capture using the same framework. It's hard to pinpoint the exact start date of a booking journey when it begins with a scroll through social media instead of a search engine query. Similarly, clicking "buy" no longer represents the end point, as consumers increasingly change or cancel their booking before they travel. The 2026 journey can be better understood as a series of orbits, each formed around a possible trip.

Our analysis of travelers' self-reported booking diaries supports this framing. Across 26 diary participants tracking 211 research and booking sessions, roughly one in three stage changes moved travelers outward in orbit rather than inward—say, from booking back out to research, or from research back out to inspiration. Half of multisession diarists made at least one such backward move over the course of their planning journey. The path is not just nonlinear; it is actively iterative.

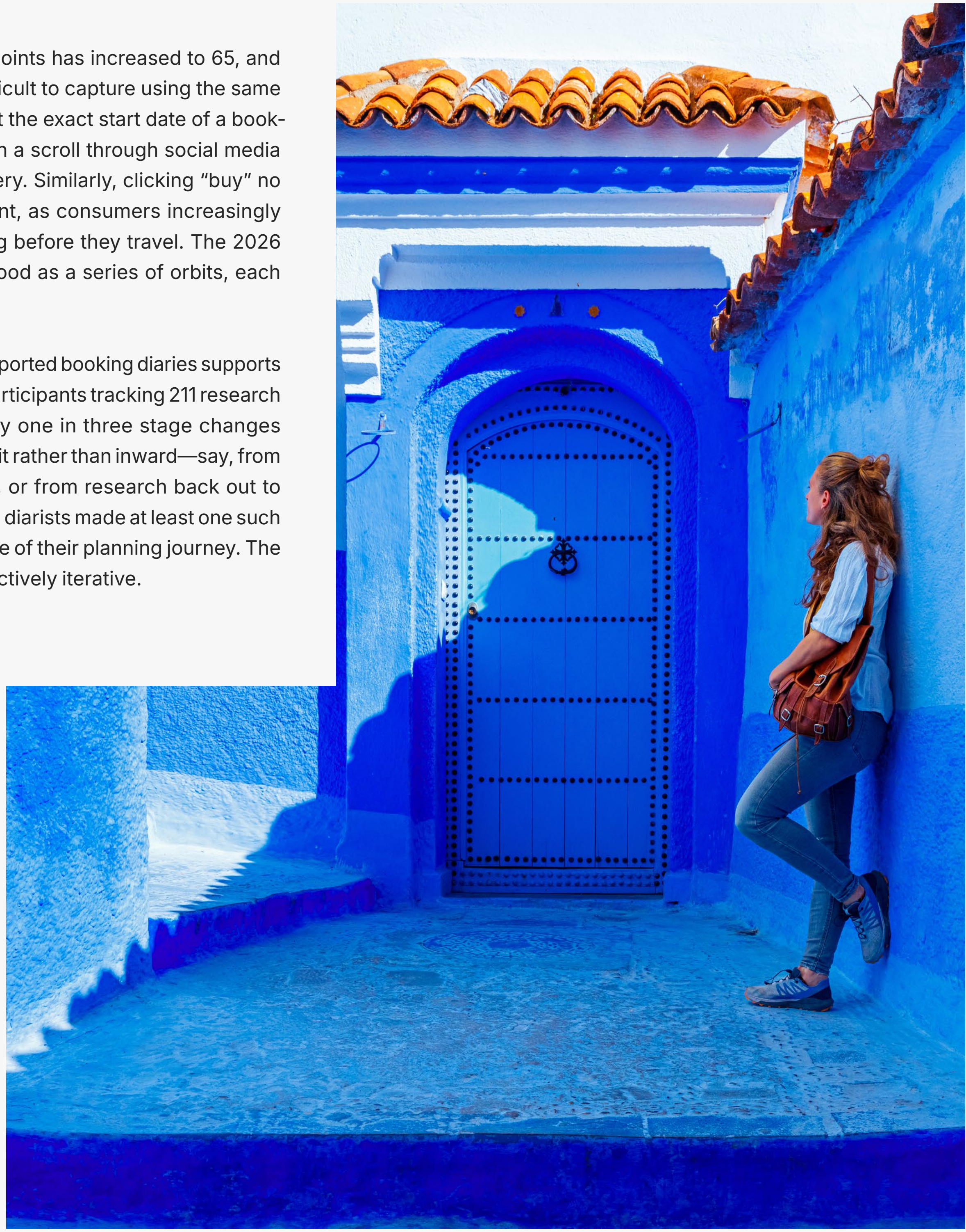
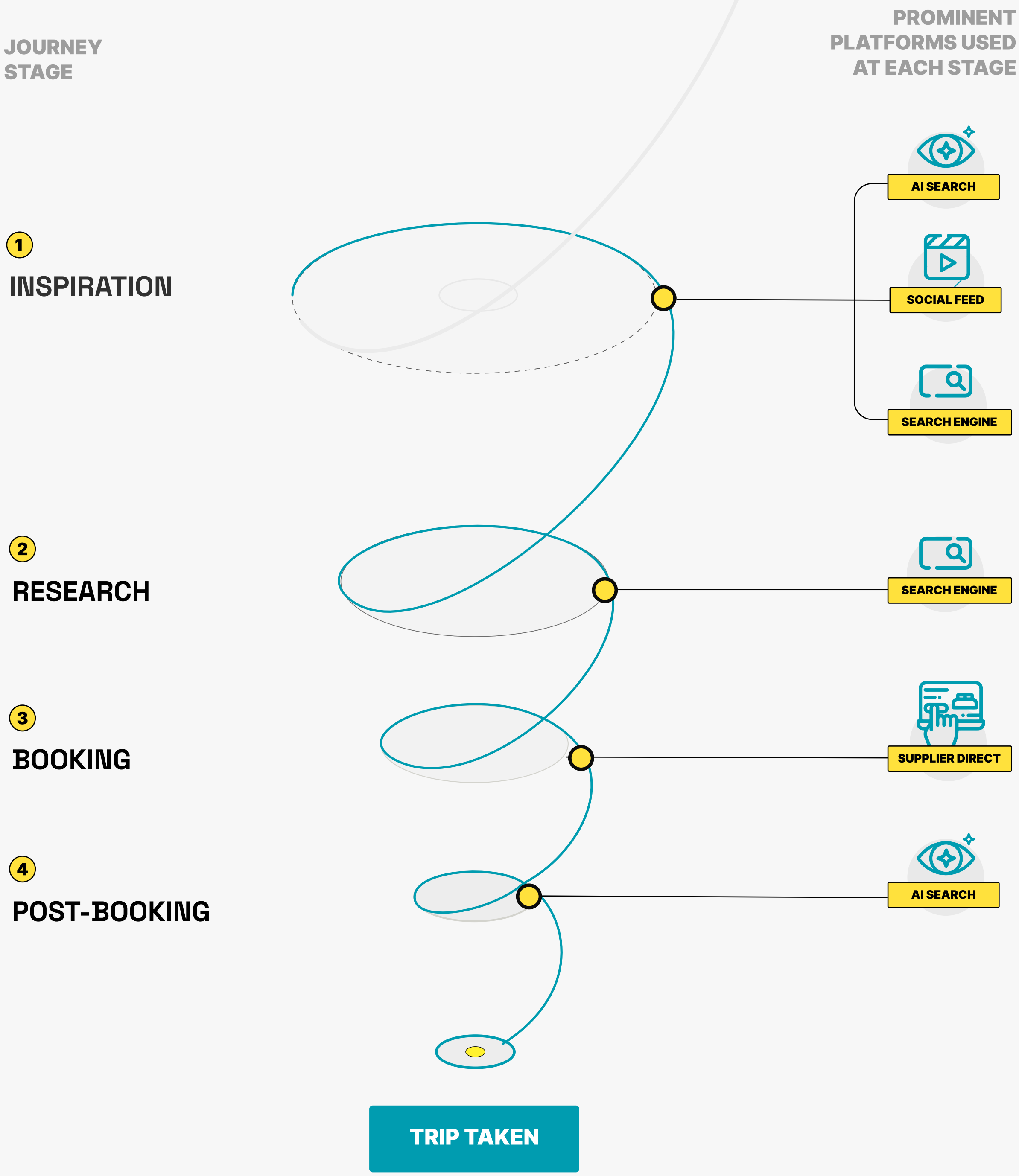


EXHIBIT 2

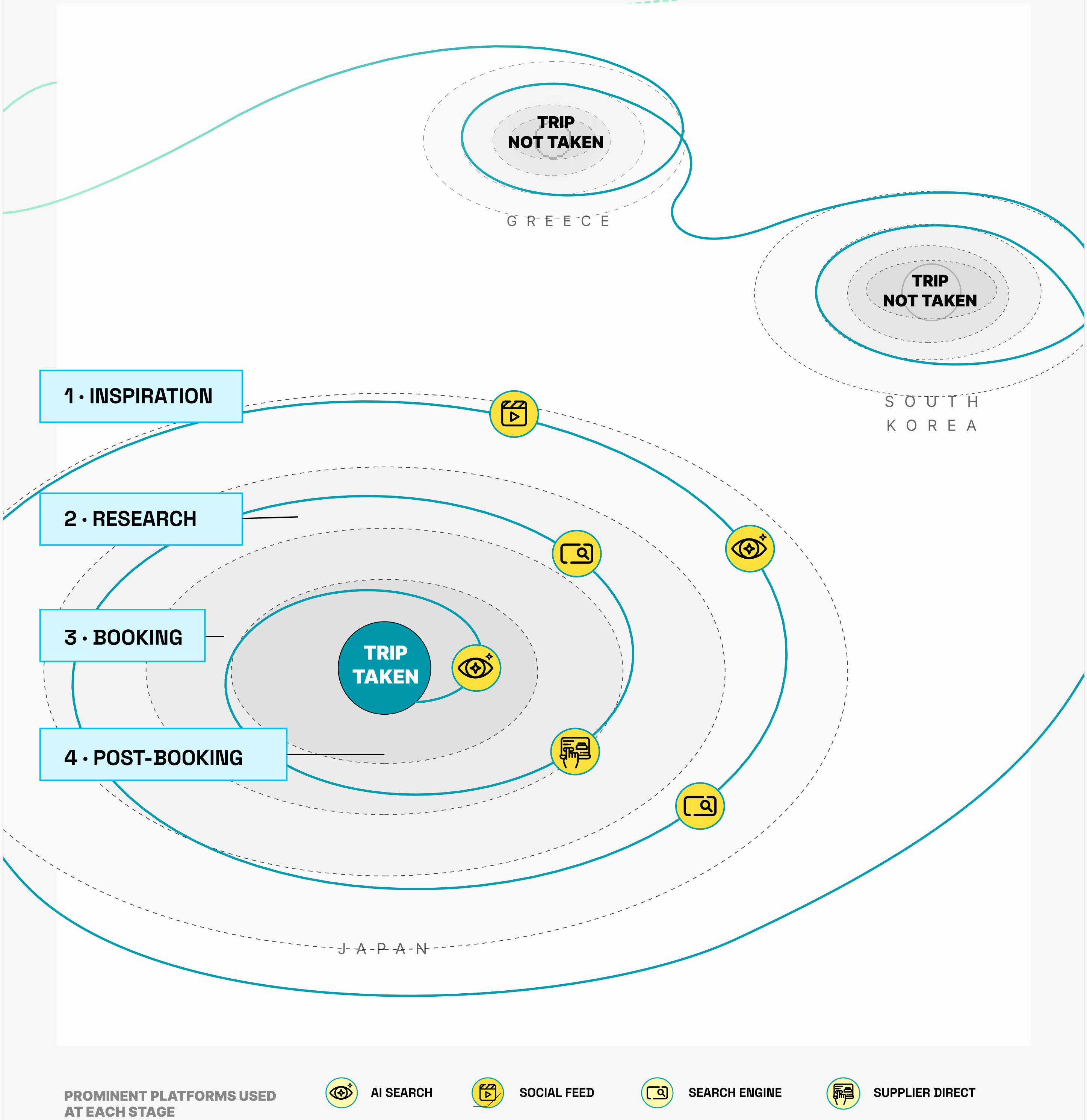
The orbital booking journey



Based on 211 travel planning sessions logged in traveler diaries, grouped into four stages. Where more than one is listed, none dominated.
Source: Skift Research Booking Journey Diary Study 2026. Data as of July 2026.

EXHIBIT 3

How travelers navigate multiple orbits



Based on 211 travel planning sessions logged in traveler diaries, grouped into four stages. Where more than one is listed, none dominated.
Source: Skift Research Booking Journey Diary Study 2026. Data as of July 2026.

Inspiration happens in the outer orbit. A traveler may see a stylish hotel in a social feed, hear about a fun destination from a friend, watch a film set in a lush locale, or ask an AI tool to serve up exciting ideas. They may remain at the periphery of booking, simply enjoying the content without intending to buy. Or they may move into a closer orbit to research specifics such as prices, transportation, and availability. From there, the traveler might continue moving inward toward validation and booking, might retreat to the outer orbit again for further inspiration, or might exit the orbit entirely.

Unlike a linear travel customer journey, today's journey can involve multiple orbits that remain active simultaneously. A traveler can save a Sicily tour video, research Seoul shopping, and discuss Portuguese cuisine with friends without treating any one idea as the definitive start of a journey. Even the orbit that actually produces a booking could remain active until after the trip is actually completed: Flexible change and cancellation policies, continuous price monitoring, and a never-ending stream of new recommendations mean that booking decisions aren't as final as they may seem.

All that said, some constants remain. People still want to visit places they will enjoy, at prices they can afford, with experiences that make the whole travel group happy. "Those underlying needs have not really changed," says Jonah Berger, professor at the Wharton School at the University of Pennsylvania and author of Contagious: Why Things Catch On (Simon & Schuster, 2013). "What has changed is how travelers collect information."

Inspiration becomes entertainment

Even consumers with no intent to plan a trip will still have travel content served to them. They encounter it while scrolling, streaming, reading, or chatting. A destination can enter consideration before a traveler has selected dates, set a budget, or even decided to travel at all.

Not every piece of inspiration turns into demand. Many ideas are liked, saved, discussed … and forgotten. Others are discarded and then picked up again as the traveler wavers on whether the idea is realistic or a good fit for them. A compelling image may attract attention, but a friend, a review, a credible creator, or another source with relevant experience often determines whether the traveler continues to orbit closer to a booking.

Faster answers, slower trust

AI adds speed to this system. A traveler can move from a vague idea to a detailed itinerary in seconds, ask follow-up questions that are instantly answered, and generate fully fleshed-out alternatives with a single click. AI is also a meta layer, drawing on reviews, articles, listings, social content, and supplier information, then recombining them in a new interface.

The technology evolves every day. But travelers' confidence in it is not advancing at the same rate. An itinerary can look polished while leaving questions that actually matter unresolved. Is this place as great as it seems? Would someone I trust have picked it? Is this really the best price I can find? And is any of this actually still available? They then check reviews, consult friends, compare prices on OTAs, or visit the supplier directly. AI can narrow the field, but trust—with a human touch—still determines whether the traveler is willing to act.

The challenge for travel players

The new shape of the customer journey creates both permission and pressure. Travel players have more touchpoints through which to inspire, reassure, serve, and sell. They also face a greater risk of losing travelers to another orbit. Capturing attention once is not enough. The goal is to help travelers maintain momentum even if they exit the orbit and then return.

That does not mean one company needs to own the whole journey. The opportunity is to make the experience feel more connected: Preserve what the traveler has already expressed, reduce unnecessary repetition, reconcile conflicting facts, and provide the proof and controls needed to move forward. ‹

When inspiration never rests, trust becomes crucial

In 2018, inspiration often followed from intent. A traveler decided to take a trip, opened a search bar, and asked, "Where should I go?" The activity that followed was organized around that decision.

Today, travel ideas increasingly arrive before intent is formed. They surface while people scroll social feeds, stream a TV series, or read an article. Inspiration is no longer the formal beginning of a process. It is an ambient condition of the traveler's life, delivered continuously and consumed as entertainment.

The result is a paradox. There are more opportunities than ever to put a destination, property, or experience into a traveler's head. But travel ideas casually discovered can also be casually discarded. There is less commitment attached. As inspiration becomes more abundant, capturing attention is only a beginning. The harder task is earning credibility—building the gravitational pull that moves a traveler into a closer orbit.

Influence disconnected from intent

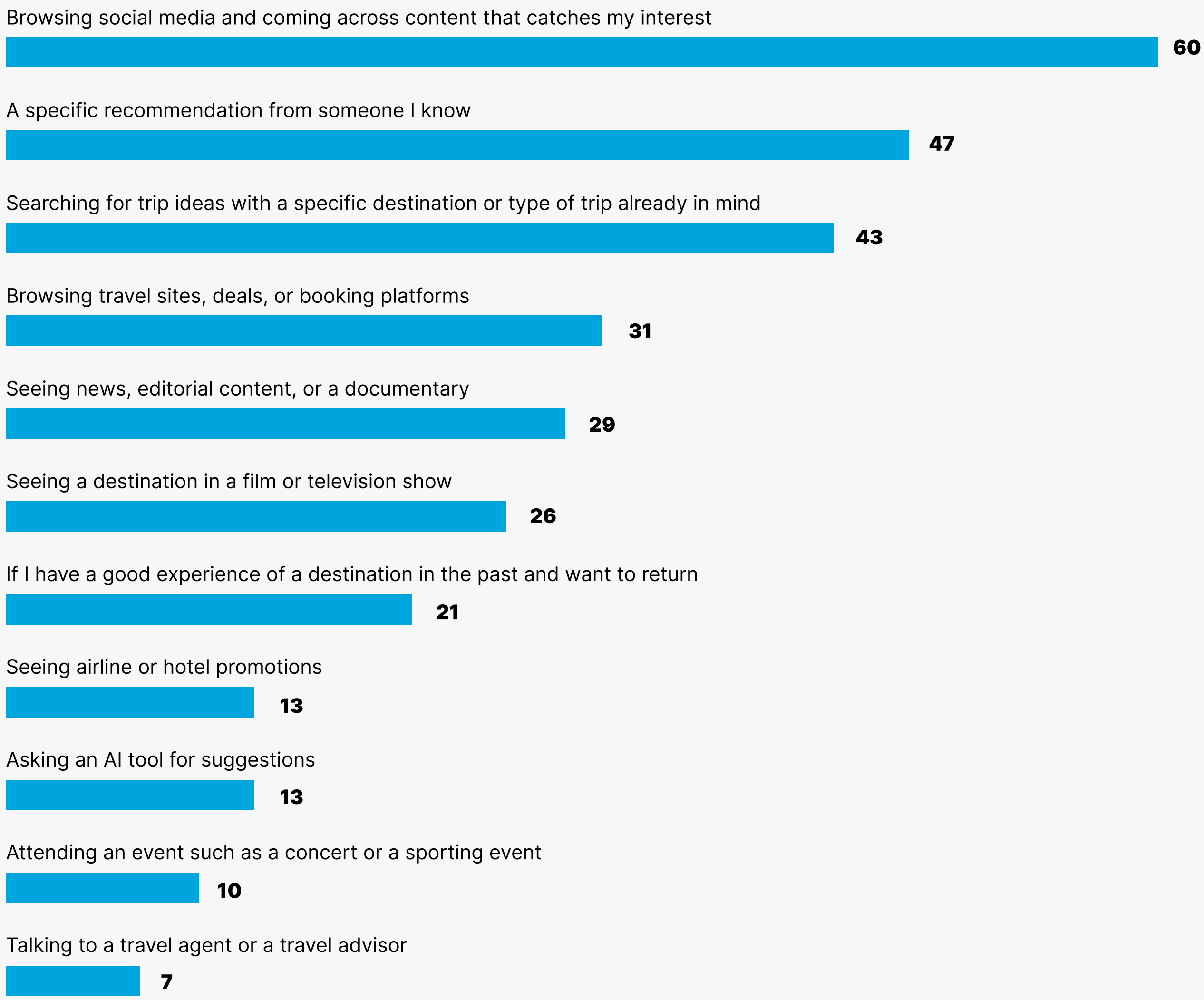
Our traveler survey illustrates just how diffuse inspiration has become. When travelers are asked how they first get the spark of an idea for a trip or destination, browsing social media and noticing content that catches their interest ranks number one, and it is cited by 60 percent as one of their top three sources.

EXHIBIT 4

Source of initial trip idea

% of respondents that ranked in Top 3, N=1015

How do you typically first get the idea for a trip or a destination? (Select top 3)



Sources: Skift Research and McKinsey & Company survey of US travelers (n=1015). Data as of June 2026

Roughly seven in ten survey respondents say that seeing travel content on social media made them interested in a destination they had not previously considered. That statistic describes influence disconnected from intent, as the travelers were not conducting research; rather, they were being entertained, and a place attached itself to them in the process.

The channels that carry this influence have accumulated in waves. Brand sites were joined by OTAs and search engines, then social platforms and reviews, and now AI. "Each layer added a new front door," says Alix Boulnois, chief commercial, digital, and tech officer at Accor. None of the previous doors closed. The result is a fast-growing number of apertures at the outer edge of every orbit—more portals through which an idea can arrive, more moments in which it can arrive, and more competitors arriving at the same place and time.

Our diary study underscores how quickly AI has become a source of inspiration. During initial inspiration sessions, AI tools and search engines were each used one-quarter of the time—a striking result given AI's short history as a consumer discovery channel.

For travel players, the abundance cuts both ways. There have never been more opportunities to enter a traveler's consideration set—and never less certainty that doing so will achieve anything.

Identity, not itinerary

Sixty-eight percent of survey respondents say the trips they take are part of how they express who they are. Inspiration is therefore less about evaluating a product than about testing a self-conception: "Does this fit who I am as a person?" (The question, "Is this available at the right price?" comes much later, and forcing it too early is an easy way to lose a traveler who is still warming to an idea.)

Short-form video and social platforms play prominent roles at the outer edge of the orbit because they are unusually good at conveying how a place feels, how like-minded travelers experience it, and what kind of person chooses it. These three things can help a traveler imagine themselves enjoying a destination. A rate grid conveys none of them.

The stakes attached to self-expression are rising, particularly among younger travelers. In McKinsey's 2024 State of Tourism and Hospitality Survey, 52 percent of Gen Z and 47 percent of millennial travelers say they splurge on experiences, versus 39 percent of Gen X and 29 percent of baby boomers. When a trip is both an identity statement and a discretionary investment, the traveler has more reason to seek inspiration everywhere—and more reason to be careful about which inspiration they act on.

'Will I like it?'

"Consumers may see an advertisement or search online for ideas and discover a country or city," says Wharton professor Jonah Berger. "But even if they first learn about a destination through a non-word-of-mouth channel, they still typically want to check with a trusted person. When people make decisions, they are not simply asking, 'Did someone else like it?' They are asking, 'Will I like it?' To answer that, they need to understand both what other people thought and how similar those people are to themselves."

Friends and family are the number one trusted source of recommendation for 65 percent of travelers, and 46 percent turn to them at the inspiration stage—not because they have better information about hotel inventory, but because they offer comparability. Friends report whether a beach was beautiful, as well as whether it suited their families, which helps the traveler infer whether it will suit theirs.

Creators can perform a version of the same function. Sixty-seven percent of travelers rank travel creators or influencers among their top three trusted sources, and the basis of that trust has broadened. "User-generated content has become more legitimate, especially with advances in AI," says Naveen Manga, global chief information officer of Marriott International. "In the past, only well-known influencers were trusted. Now, lesser-known creators can have a big impact.

Sometimes it is a creator who posts consistently and credibly about a product. That social proof matters."

The survey results reaffirm where confidence comes from. Content from travelers who have experienced or reviewed a destination is the factor most commonly ranked as the number one source of confidence, selected first by 25 percent of respondents and placed in the top three by 41 percent. This is not the brand's self-produced material. It's not a polished campaign. It's evidence from someone recognizably like the traveler.

Proof and trust are marketing assets

If credibility is the gate, then the practical question for operators is not how to generate more inspiration but how to attach proof to it. Operators who have tested this are finding that the returns on consumers' trust show up in conversion, not just in sentiment.

"We ran A/B tests on hotel pages with and without customer reviews," says Alix Boulnois of Accor. "One of the key lessons for us is that trust drives conversion. Customers increasingly expect transparency and authenticity when making travel decisions. We have consistently seen that surfacing genuine customer feedback and real guest experiences creates more confidence than presenting a purely curated brand narrative. It can be reviews—even the bad ones, user-generated content, and so forth, as long as it shows people in real-life situations having experiences that feel relatable."

It's a counterintuitive finding: Transparency about imperfection outperformed the absence of information. Travelers are not looking for a flawless picture. They're looking for an honest one.

For destinations, the goal is less about volume than about fit. Turespaña brought a Chinese influencer to the Val d'Aran—a mountain trail-running race with no Chinese participants, held in a remote valley in the Pyrenees. "The following year, 200 Chinese runners registered," says Miguel Ángel Sanz Castedo, general director at Turespaña. "It shows the power of one creator in a long-haul market. People flew to Barcelona and drove five or six hours because someone they trusted generated content about a place and event they might never have found on their own."

Upstream influence is earned when a trip feels specific, human, and story worthy—when something happens that the traveler wants to recount. That largely depends on what an operator builds and whom it hires. Staff cannot be generic hospitality hires; they need judgment, warmth, and local fluency because when guests share, they often share content about people as much as they do about places. "We empower teams to delight the guests," says Boulnois. "For example, on Mother's Day, a woman staying with us was missing her children, and the team put a picture of her children in the room and recorded a voice message from them. We want our staff to do things with heart, and this is built into how we train and recruit people."

The handoff should extend inspiration, not interrupt it

The reality is that owned channels tend not to be where most inspiration occurs. Only about 26 percent of travelers visit OTAs or direct supplier sites for inspiration—a fraction of the 46 percent who turn to social media or friends. “Where customers go to find inspiration is increasingly social and AI platforms,” says Heather Balsley, chief commercial officer of IHG. “We are beginning to see shifting behavior in our own channels too—customers arrive further down the decision funnel than they might have a few years ago.”

A hotel’s Instagram account or loyalty app will likely never rival TikTok as a discovery engine. What matters is what happens at the moment of handoff, when the traveler arrives at the operator’s website or app—after saving a post, clicking a creator’s link, or opening an email. They come with something specific in mind: a place, a feeling, a reason they were interested. The temptation is to treat that arrival as the moment to close the sale. But a generic homepage, a rate grid, or a “book now” prompt asks the traveler to switch registers abruptly, from “Does this fit who I am?” to “Will I transact today?” The second question is often not one they are ready to answer.

“I’ve long believed that planning travel is half the fun,” says Evan Konwiser, chief product and strategy officer at American Express Global Business Travel (Amex GBT). “Most consumers relish having dozens of tabs open as they move across travel sites and experiences.” Almost 80 percent of travelers say they genuinely savor planning. Inspiration is a pleasure to be extended, not eliminated with a hasty and uncouth sales pitch.

The design problem, then, is how to engineer serendipity by giving travelers the feeling of stumbling onto the right trip without forcing a decision on them before they are ready. In practice, that means enabling orbital paths that feel more like exploration than a checkout counter. The moment of arrival is the place to surface reviews, relatable traveler imagery, and a clear reason why the experience fits—while the traveler is still deciding whether the idea is worth pursuing. Landing pages can pick up the narrative the traveler brought with them (“continue exploring this trip”). Save, compare, and import functions let a traveler orbit a trip more closely without fully committing. ‹

Research tools are more powerful, but they come with a restart tax

Inspiration sits at the outer edge of a trip's orbit. Research represents a traveler's early attempts to move inward, and it is where they encounter the most friction.

The work of travel research is familiar: Travelers gather options, compare them, test which sources can be trusted, and hesitate before committing. That was true when the process involved a human travel agent and a brochure, and it remained true when the action moved to search engines and browser tabs.

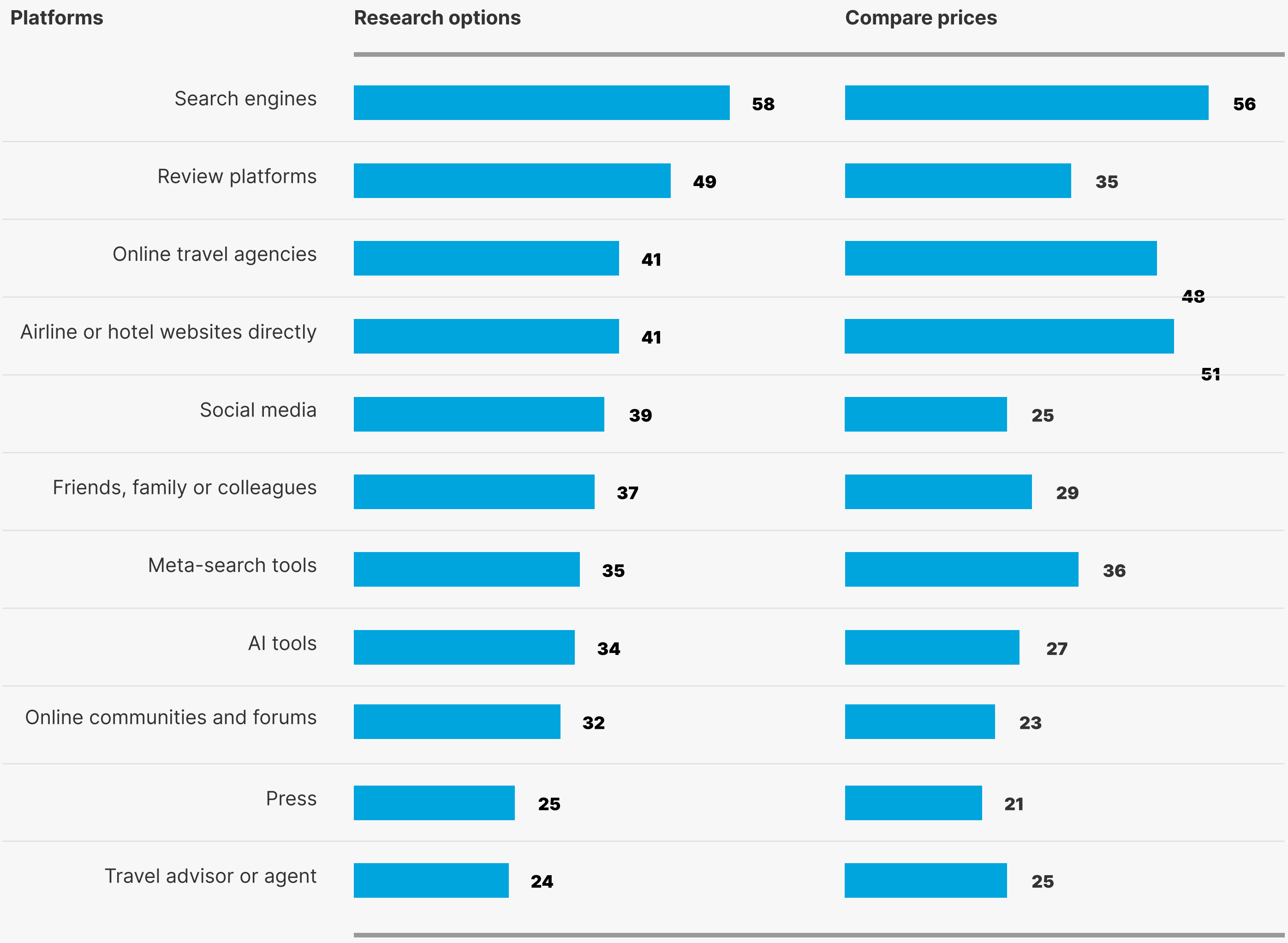
What has changed is the volume of information, the number of tools and touchpoints involved, and the frequency with which travelers are prompted to reconsider their choices. Search, reviews, OTAs, supplier sites, social platforms, friends, forums, metasearch, and AI now converge during research. Each additional tool can make an individual task easier. Yet the final decision can become harder to reach. Faster answers create more opportunities to ask another question, open another tab, or reconsider an option that had already been rejected.

These tools also rarely share context. A saved social post does not know what the traveler compared on an OTA. An AI conversation may not reflect that one hotel was ruled out by a review site. Seventy-four percent of travelers revisit the same sites or apps multiple times before deciding, but they are left to carry the work across platforms and reconstruct the decision map each time they return.

EXHIBIT 5

Research by platform

N=1015, % of respondents that selected "Yes" to that platform on that stage



Sources: Skift Research and McKinsey & Company survey of US travelers (n=1015). Data as of June 2026.

When travelers describe the tools they used while researching their most recent trip, no platform dominates. Nine channels are used by roughly one-third of travelers or more. This is not a funnel steadily narrowing toward a decision. It is a traveler assembling the decision across multiple places, with no single one displaying the whole picture.

Every handoff costs the traveler something

Each move—from a saved post to search, from search to an AI tool, from the AI tool to reviews, from reviews to a supplier site—strips away part of the context the traveler has already built. Preferences are reentered. Dates are retyped. Options already rejected resurface as if they had never been considered.

Our analysis of travelers' self-reported trip-planning diaries indicates that the most frequent source of negative sentiment is not any single platform but the handoffs between them, with travelers reporting unwelcome surprises when validating pricing, reviews, or specifics across sources. The friction lives in the seams.

"We are still making the traveler do the work," says Naveen Manga of Marriott. "People may start planning on a browser, drop off for a call, and then resume later on a mobile device while doing something else. They do not want to restart the whole journey. We have not solved continuity as an industry."

The new shape of the customer journey raises the cost of this unsolved problem. In a bounded path toward booking in 2018, a lost session was just a delay: The traveler had an intent and would eventually return to it. Today, a traveler rarely considers just one possible trip. They may have saved a video of Rio, partially researched Tokyo, and discussed Lisbon with friends, with no single idea holding the status of a plan. Inspiration is always available and always frictionless, while research never is. The traveler who stalls can be orbiting a different trip within a day, when a new idea arrives with none of the accumulated difficulty attached.

When planning stops being fun

The emotional register of the research stage is markedly different from that of inspiration, and the survey data captures the transition.

The single most frustrating moment travelers report is when they compare multiple options. Respondents find this moment even more frustrating than moments in which they doubt whether they've made the right choice. These are complaints about being handed many credible options and given little basis for distinguishing among them.

Almost half of respondents say the volume of choice and information online feels overwhelming, and a nearly identical share feel anxious about making the wrong booking decision. Family-trip planners report the highest levels on both measures: When a decision must satisfy several people and consume a year's discretionary travel budget, every additional option raises the cost of getting it wrong. "Aspirational trips, like a family vacation, see more validation loops because the inspiration comparison process has to happen more deeply," says Naveen Manga of Marriott.

Professor Sheena Iyengar of Columbia Business School puts it plainly: "The desire for choice is real, but the actual exercise of comparing, contrasting, and making a choice is not straightforward," she says. "I know the difference between an apple, an orange, a banana, a peach, and a plum, but if you gave me five different kinds of apples, fifty shades of white paint, or a bunch of hotels that all look good and have beach views and you don't know which ones are telling you the truth or what they're leaving out—it gets very complicated."

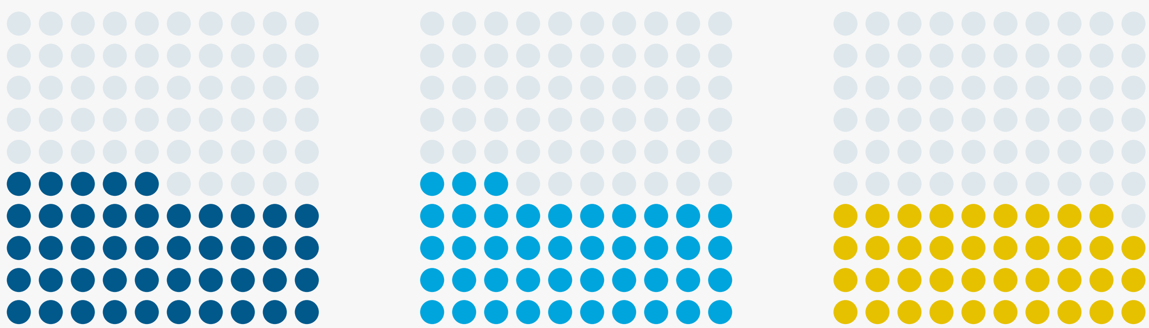
AI is not eliminating the problem. Nearly 60 percent of respondents agree that although AI gives them answers faster, it also causes them to spend more total time researching. Speed at the level of the individual query has not produced speed at the level of the decision.

EXHIBIT 6

Top 3 pain points reported by travelers when planning their trips

N=1015, % of respondents that selected "Yes"

Were there any moments in the trip planning process that felt particularly frustrating?



45%
Comparing multiple travel options

43%
Second guessing on making the right choice

39%
Coordinating across different trip aspects

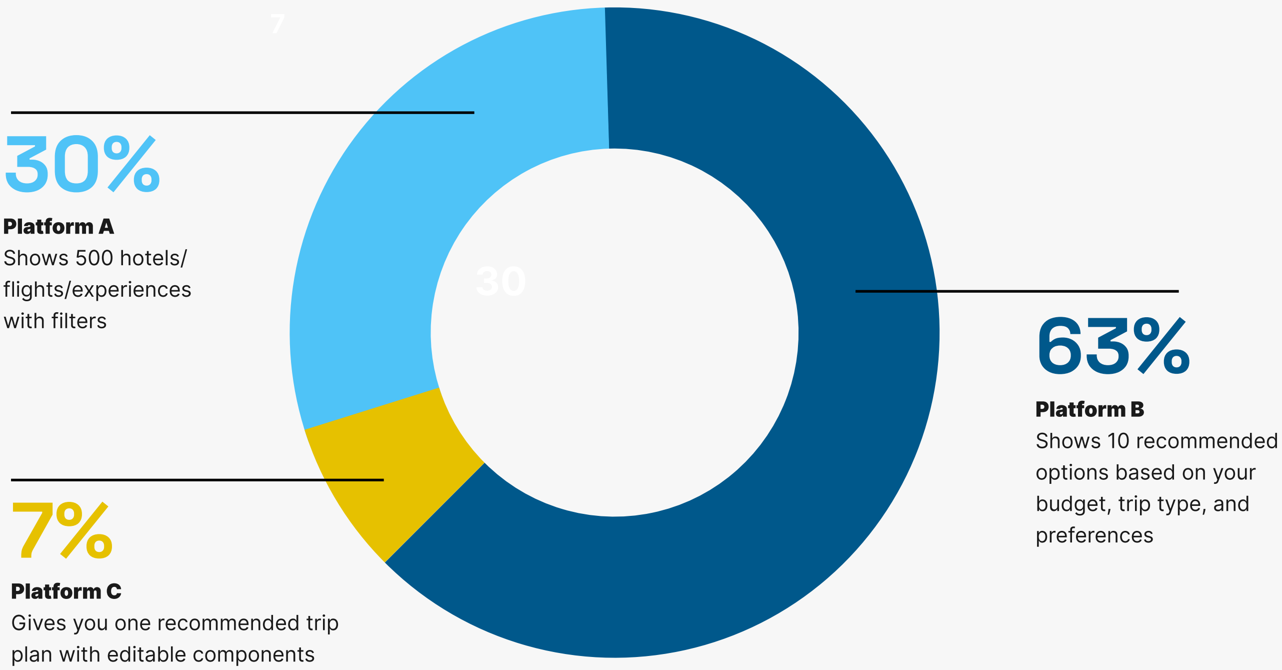
Sources: Skift Research and McKinsey & Company survey of US travelers (n=1015). Data as of June 2026

EXHIBIT 7

Travelers favor a balance of curation and choice

N=1015, Share choosing each platform when prices and inventory are held equal

Imagine three travel platforms have the same prices and inventory. Which one are you most likely to use?



Sources: Skift Research and McKinsey & Company survey of US travelers (n=1015) Data as of June 2026

Neither 500 options nor one answer

The instinctive industry response to research friction has been to add supply and improve filters. Our survey suggests travelers are asking for something else entirely.

Respondents were asked to imagine three platforms with identical prices and inventory and then choose which they would most likely use: one showing 500 hotels, flights, and experiences with filters to sort through them; one showing ten recommended options based on budget, trip type, and preferences; or one offering a single AI-recommended trip plan with editable components. Thirty percent preferred the full searchable catalog, 63 percent chose the curated set of ten, and only 7 percent wanted the single AI-generated plan.

Travelers want a credible short list, a clear reason each option made the cut, and the ability to compare, adjust, or reject what they are shown. Curation and control don't need to be in tension. Iyengar names the constraint the single AI-generated option violates: "Travelers have to feel they chose it. If they don't feel empowered in the decision, you lose them."

The criteria travelers use to narrow choices are less complex than the industry's filter architecture implies. Roughly 40 to 45 percent cite price or affordability as the basis on which they cut the field, and 30 to 35 percent cite location or proximity. A traveler facing a slew of similar listings is rarely looking for a 40th checkoff attribute to sort by; they are looking for someone to apply the two that matter and show the reasoning. Evan Konwiser of Amex GBT is blunt about the commercial consequence: "Immense power flows to whoever narrows 50 options down to two or three."

Build for the return

The more important platform design question is not how to convert a consumer's first visit but how to make the fifth one better than the fourth. Saved content, stated budgets, previous comparisons, options already rejected, expressed preferences, and open questions should persist across sessions and devices, so that a traveler who comes back arrives in a closer orbit than when they left.

Structure is what makes memory useful rather than merely stored. Held as a transcript, context is only a record. Held in structured form, context becomes actionable—the platform can notice a gap, flag a conflict, or surface a change without asking the traveler to reexplain the trip. Context provided by travelers can be used to build the right recommendation in the moment and can be retained by operators after a session ends.

The second component is resolution—a conversational fact layer that lets travelers ask questions and reconcile the conflicting prices, policies, inclusions, reviews, and availability that push them across platforms in the first place. Manga describes Marriott's approach in these terms: Let the interface do the work instead of the traveler, interpret intent in plain language, and answer with verified first-party data instead of relying on a model for basic facts. The traveler can settle a question where they are, rather than opening three more tabs to settle it elsewhere.

Under the old model, the goal of the research stage was to move the traveler toward checkout. Now the goal is to be the reason the traveler keeps moving inward on this trip rather than starting fresh on another one—because they will leave, repeatedly and without a second thought, and the players that win will be those that can make coming back easier than starting over.

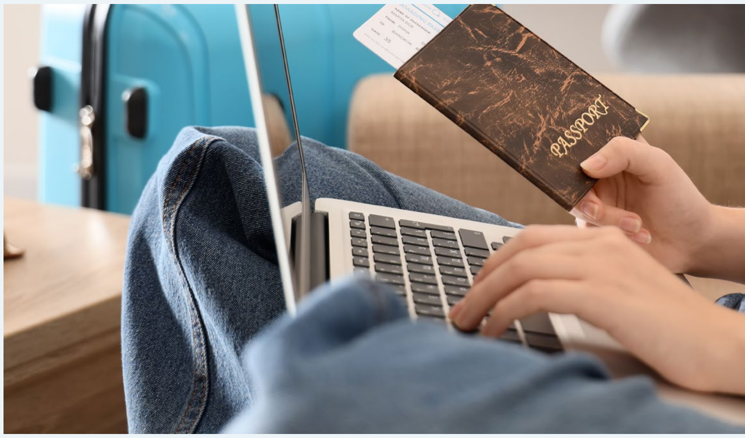
AI is reshaping how travelers interact with operators faster than operators are ready for

By the time a traveler enters an orbit and moves inward to the research stage, two hurdles remain before the traveler proceeds to book with a given operator: The operator must enter the traveler's consideration set, and the traveler must feel confident enough to complete the transaction. AI is reshaping the first step far faster than anyone is resolving the second.

For operators, this creates a new visibility challenge. Competitive rates, strong content, and a frictionless checkout could have little value if the product never appears in an AI answer. Incomplete or poorly distributed content can keep a strong offering outside the consideration set, without the provider ever knowing it was excluded. Strong search rankings and healthy review scores don't confirm that a brand is appearing in AI answers, and the metrics that operators track today may not show where—or how often—the brand is absent.

Ensuring visibility in the traveler's consideration set

In a recent exercise, McKinsey submitted the same travel prompt simultaneously to three AI portals and two OTAs' AI tools. Comparing the five outputs side by side highlights the fragmentation in AI answers. For example, when the platforms were asked for "top three kid-friendly Chicago hotels with river views for Labor Day," no single hotel appeared in all five responses, and most hotels appeared only once. Hotels with content that featured specific, documented amenities (for instance, a specialized suite for families with children) tended to be surfaced more consistently than those that used more generic language (for instance, "family friendly").



For the traveler, this type of fragmentation can add work instead of removing it. Getting a reliable answer requires using more than one AI tool—not because any single tool is wrong, but because each one can surface a different "best" pick, and the traveler needs to view several before trusting the results are comprehensive. Fragmentation can also erode confidence in whatever answer a traveler does get. When every tool delivers a different top pick with equal certainty, no single response earns enough authority to be taken at face value, and the traveler is left reconciling answers instead of relying on one.

Understanding the capabilities and limitations of AI interfaces can open new opportunities and framing for travel brands. The prompt "Help me plan five days in Paris (first time)" prodded some platforms to link out to museum booking sites and neighborhood guides, and the prompt "best way to experience the Amalfi Coast" led some platforms to lead with specific preferred towns and others to lead by suggesting the trip be organized around boat transport within the destination. Travel brands can consider how to publish content that best aligns with how AI platforms respond to travelers' queries.

Eligibility is increasingly decided upstream of the transaction: "What we're seeing is that AI is becoming kind of a new front door to travel planning and discovery," says Heather Balsley, of IHG. But it's a front door that can open onto a narrower world of options. A traveler who asks an AI tool where to stay might surface three or four properties instead of three hundred. The rest are eliminated before the traveler opens a single supplier or OTA site.

At the Skift Global Forum 2025, OpenAI board chairman Bret Taylor argued that AI is likely to collaborate with the travel ecosystem rather than replace it wholesale. While the architecture for that collaboration is still being built, a new layer of discoverability tools is already emerging. Organizations can build capabilities to monitor how they appear in AI recommendations across LLMs [large language models] and OTAs' AI tools, track rankings against competitors, and understand whether AI responses send travelers directly to supplier booking sites or to OTAs.

Showing up in AI results can be unpredictable. Turespaña audited how models responded to travel prompts relevant to Spain. "When we prompt LLMs on where to discover castles in Europe, Spain often does not appear despite having among the most castles in Europe," says Miguel Ángel Sanz Castedo of Turespaña. "LLMs rely on travel sources like OTA inventory and tour operators, where German castles are often packaged as products and Spain's often are not. We learned we have to influence those upstream sources, not just rely on our own website—so we are working with tour operators to get Spain into the content that LLMs actually use."

While early signals are mixed, some operators are already seeing that the small share of organic traffic coming from LLMs tends to convert to bookings at meaningfully higher rates. LLMs are likely already helping customers arrive at the booking stage with greater confidence about fewer options, underscoring the growing importance of generative engine optimization (GEO).

Suppliers and intermediaries need a credible presence beyond their own sites—meaning they need review strategies, rich listing content, social proof that gets shared, and structured data that survives AI summarization. "Social platforms feed the algorithms of AI platforms," says Alix Boulnois of Accor. "If you are not present at scale in a positive way on social media, you risk not surfacing in the GEO of LLMs."

Players can treat GEO as a recurring diagnostic, much as they do with SEO. They can trace which third-party sources (affiliate sites, blogs, user-generated content, editorial reviews) each model is most influenced by, map the topics that travelers ask about in AI searches, and then build content against those high-volume themes before competitors own the delivered answers (all while tracking their share of voice and sentiment versus peers).

Being surfaced is not the same as being bookable

Even if an AI portal does surface the product, appearing in the answer is not the same as being bookable through it. "Where it falls short is when money gets involved, and the traveler moves from inspiration to fulfillment," says Naveen Manga of Marriott. "Travelers are cautious about giving an open model their credit card; rates, policies, and amenities may be directionally correct, but they are not yet authoritative."

Rates change. Policies vary. Amenity lists may be incomplete or written for a human reader rather than for a machine. In hospitality, a wrong answer can mean a broken trip or a lost guest.

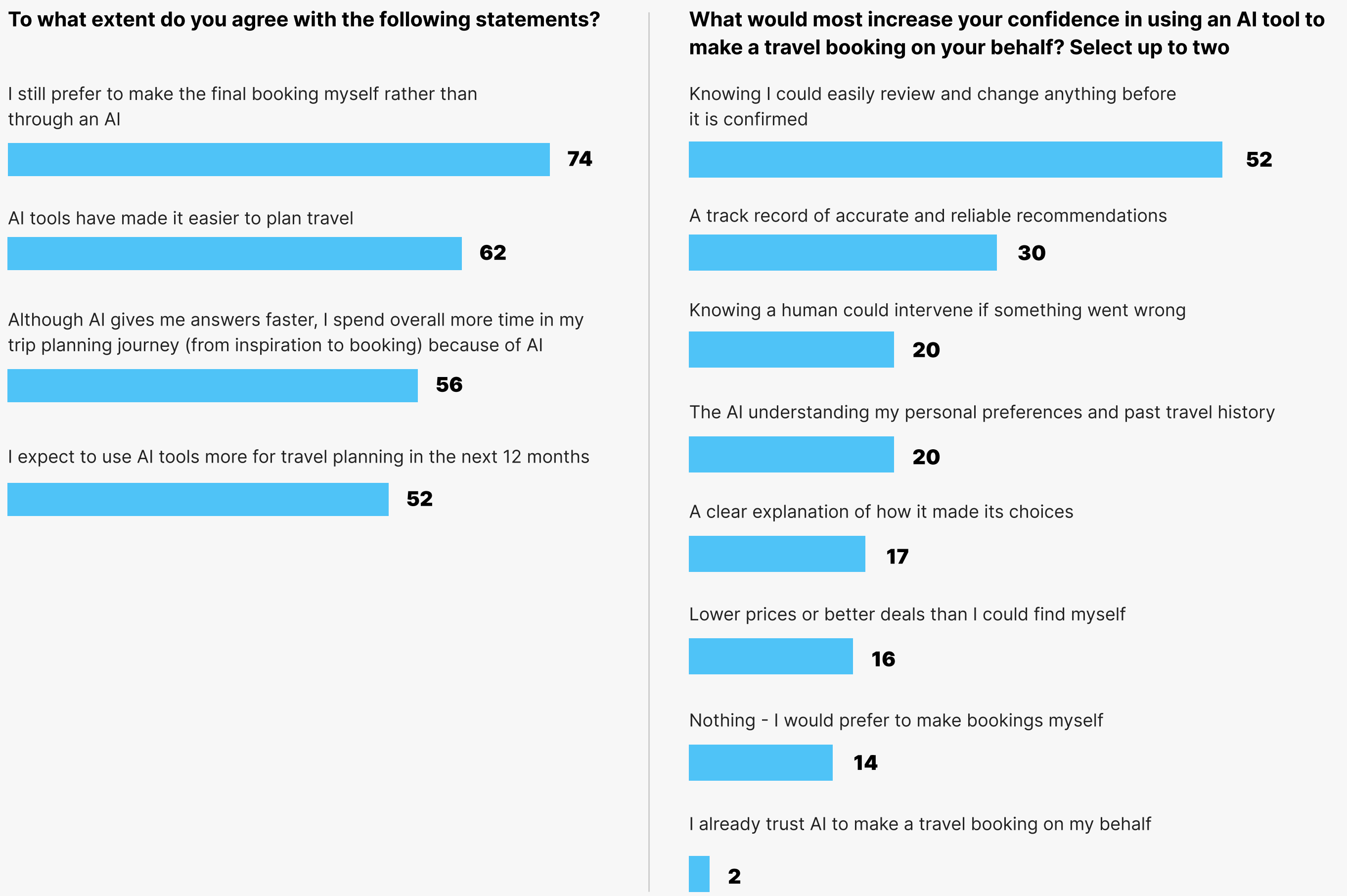
The direction of travel is already visible in booking infrastructure. In May 2026, Google added hotel booking to its Universal Commerce Protocol, a system that allows AI agents to handle purchases inside search and chat interfaces. The checkout layer that agents will need is being built. Whether a given supplier will be accessible through it is a decision that the supplier is making now, perhaps without realizing it.

"We're focused on how to position ourselves well for the world of agentic search and discovery and, over time, potentially agentic booking," says Pat Nestor, head of AI and data analytics for Hyatt. "We're ensuring that Hyatt.com is structured so our content can be discovered, parsed, and surfaced by AI-powered search tools. That means a slightly different approach to content creation and curation as SEO evolves to GEO."

EXHIBITS 8 & 9

Travelers want AI to advise, not to act

% of respondents who answered "Yes", N=1015



Sources: Skift Research and McKinsey & Company survey of US travelers (n=1015). Data as of June 2026

Travelers will consult AI, but might not hand it the keys

AI adoption is real. Sixty-two percent of travelers say AI tools have made planning easier, and more than half expect to use them more over the next 12 months. AI is used by 34 percent of travelers during research—more than at any other point in the journey. Willingness to delegate to AI, however, falls away as the stakes rise. Seventy-one percent of travelers are comfortable letting AI generate initial ideas, and 67 percent are comfortable letting it compare and narrow options—but only half will let it make a flight or hotel booking on their behalf or handle a disruption during the trip. Discomfort nearly doubles at the point where AI stops advising and starts acting, with three-quarters of travelers preferring to make the final booking themselves.

Booking behavior confirms these stated preferences. Roughly 43 percent of respondents booked directly with an airline or hotel for their most recent trip, and roughly 42 percent booked through an OTA. Metasearch platforms played a booking role for 22 percent, and only 16 percent used an AI tool to book anything travel related.

The self-reported diaries reveal the same pattern. AI tools appeared in a quarter of initial inspiration sessions and one-third of postbooking sessions—the two moments in the journey when travelers reach for them most—but only in a small minority of booking-stage channel mentions. The tool travelers use to explore ideas, and to plan details of the trip after it is booked, is not the one they use to complete the major transaction.

Asking an AI tool a question commits the traveler to nothing. Authorizing it to book commits money, dates, and itinerary choices. Forty-nine percent of respondents rank greater trust in a supplier's website as their number one reason for booking direct—ahead of better prices or exclusive deals—and 87 percent place it in their top three. Trust is the key currency at the point of transaction.

"I believe consumers will become more comfortable with agentic-led transactions over time," says Pat Nestor of Hyatt. "It's not all that different from the first time you could process your credit card online and there was widespread apprehension, but now consumers wouldn't think twice about it."

Friction has been removed from the mechanics of the checkout but not from the emotions of it

Sixty-one percent of travelers say booking a trip has become easier over the past year—the product of a decade of investment in cleaner flows, better mobile interfaces, smoother payments, and fewer broken handoffs. Asked in open-ended responses to name something about travel planning that feels surprisingly easy, travelers cited booking directly on an airline website and then checking in, which is a task with clear boundaries, familiar interfaces, and systems that work.

So the traveler arriving at the center of the orbit is no longer slowed down by the transaction itself, but by the question of whether to finalize it. Fifty-two percent still feel anxious about making the wrong booking choice, and 43 percent cite doubting whether they made the right choice among their frustrations. Mechanical friction has been engineered out. Emotional friction has not.

Where and how confidence weakens

Travelers are not refusing AI booking on principle. Only a small minority (14 percent) say nothing would persuade them to allow a tool to book on their behalf, which means the reluctance is conditional. When asked what would most increase their confidence in AI-assisted booking, 52 percent want the ability to review and change details before confirmation, while 30 percent are looking for a track record of accurate recommendations.

Twenty percent would feel more confident if they were assured of human intervention in the event that something goes wrong. A delay, cancellation, or missed connection is not a hypothetical edge case but a routine feature of travel. It is also the task travelers trust AI with least—only 51 percent are comfortable letting a tool handle a disruption, the lowest score of any use case tested. Delegating a booking means delegating whatever goes wrong with it, and travelers are not willing to do that without a person reachable at the other end.

Twenty percent would have increased confidence if AI understood their personal preferences and past travel history. Operators often mistake this for a model limitation. "AI is only as personalized as the information you give it," says Evan Konwiser of Amex GBT. "Most AI tools don't really know you yet. You might say you're a family of four, your kids like certain activities, you've been to cities you enjoy—and it gets a little better. But that's pretty basic stuff a travel agent would have asked before. If everyone had a personal-assistant AI that really knew them—learning from past trips, preferences, what worked and what didn't—the utility would become enormous." ‹

Booking confirmation is just a pause, not the end

A traveler can enter an orbit, move inward through research and validation, commit at the center and hit "buy"—and still not be at the end of the journey. The expectation now is that a booking is provisional rather than final. Consider that four in ten travelers have changed booked accommodations after seeing a more attractive option.

"The postbooking phase is part of the validation loop," says Naveen Manga of Marriott. "One reason it lingers is cancellation policy: Travelers may be able to cancel up to a certain point, so they revisit. As an industry, we allowed that. If we want to stay relevant and competitive for trips booked months in advance, we cannot treat booking as 'set it and forget it.'"

Seventy-eight percent of travelers say they continue planning and researching after booking, and only 18 percent stop once the main reservations are made. The activity is substantive: 68 percent research restaurants, activities, and things to do in more depth; 64 percent continue browsing social content about the destination; and 48 percent share plans or ask friends and social networks for recommendations. Postbooking is a bundle of loops—plan, compare, share, reprice—that extends the pretrip window well past the purchase.

Underneath it is a single motive. Travelers are reassuring themselves that the trip they chose is still the right one, that they have not missed something better, and that they will know how to make the most of it when they arrive. Booking is no longer the finish line. It is the midpoint of a longer relationship.

The booked traveler remains an active shopper

It's crucial for travel players to be aware that 41 percent of travel consumers monitor the price of an existing booking to see whether they can get a better deal, and 29 percent continue looking at other options in case something more desirable becomes available. That reshopping produces real outcomes: 51 percent of travelers have changed a hotel or accommodation after seeing a preferable option on social media, and 29 percent have done so more than once. According to the diary study, nearly two-thirds of moves that took a traveler further out of a trip's orbit involved moving from a booking session back to research.

Sixty percent of travelers say social content has led them to add activities to an itinerary, 41 percent to extend a trip, 34 percent to book sooner than planned, and 22 percent to choose a more expensive option. The channel that reopens a hotel decision is also capable of driving incremental spend. The implication is that providers must view postbooking through two lenses. A traveler who has booked with the provider must be retained until departure. A traveler who has booked elsewhere may still be won as they monitor prices, consider upgrades, fill itinerary gaps, and ask again and again whether the original choice was right.

Defend the booking—and compete for the switch

For the operator holding the booking, the first task is to identify which reservations are most exposed to reconsideration and where intervention is likely to preserve value. Relevant signals include lead time, cancellation terms, acquisition source, trip composition, loyalty status, price sensitivity, and subsequent engagement.

Operators that do not hold the reservation can invite travelers to import a confirmation or itinerary to compare rates and inclusions, monitor flexibility, or assess a differentiated alternative. The winning offer does not always need to be the cheapest. A better product at a similar cost, an upgrade, a useful bundle, or more flexible terms may justify the effort of switching.

Neither approach should become a blanket margin play. Operators should not match every rate, compensate every price movement, or pursue every cancellable reservation. They need rules that identify where intervention is likely to create incremental value. Tests can vary by segment, lead time, cancellation window, trip value, and offer type, with control groups evidencing whether an action genuinely protected or won revenue.

The relevant calculation is not the cost of an amenity or discount in isolation; rather, it is the cost relative to the margin preserved or acquired. Because booked travelers continue shopping, providers must continue competing.

From confirmation email to service layer

Restaurants, activities, transport, and reviews are realms that already belong to established players. For most travel operators, the practical route is integration: incorporating credible partners' offerings into the operator's own tools.

Culinary experiences sit at the center of much postbooking activity, and incumbents have taken notice. In June 2026, American Express agreed to acquire TheFork (a European reservation platform linked to more than 50,000 restaurants) from Tripadvisor for $700 million, extending a dining network that Amex says will exceed 75,000 bookable venues.

Owning every element of the trip is not imperative but having a strategy for where and how to play is. A service layer can reduce the likelihood that an existing customer reshops, give a traveler who booked elsewhere a reason to enter the operator's ecosystem, and generate additional revenue through dining, activities, transport, and upgrades. Each useful addition also increases the traveler's connection to the platform and raises the effort required to move the underlying trip elsewhere.

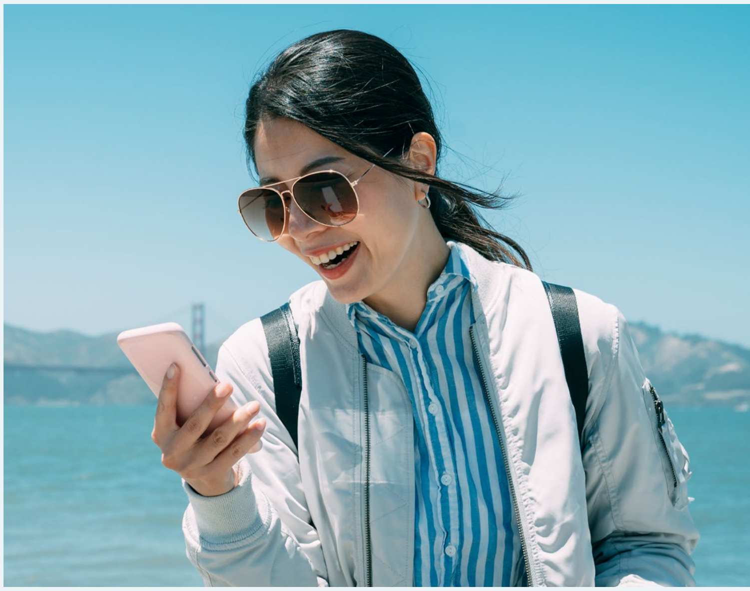
One trip feeds another

After a trip, 53 percent of travelers share photos or videos on social media; 45 percent write a review on a platform such as Tripadvisor, Google, or Booking.com; and 36 percent recommend specific hotels, restaurants, or experiences directly to friends and family.

That output is where somebody else's orbit begins. The reviews that persuade the next traveler, the creator content that shapes what AI models surface, and the peer recommendations travelers trust are all produced by people who have already made the trip. Postbooking service quality can determine the volume and sentiment of the proof that shapes future journeys. ‹

What travel players can do next

The shifts described in this report do not require travel players to invest everywhere at once. But they do suggest a need for disciplined decision-making about where the organization can credibly influence the traveler, which sources of friction it is best positioned to remove, and how to keep the traveler moving forward through the customer journey.



Pair inspiration with proof and a clear next step

The objective is to determine where a priority traveler is most likely to encounter an idea, what will make that idea feel credible, and how the experience will encourage continued exploration.

Each inspiration initiative should be designed around three elements: the spark, the proof, and the next step. The spark is the distinctive experience, story, or point of view that earns attention. The proof is the evidence that makes it believable—such as reviews, social media imagery, creator testimony, or examples from people with similar needs or outlooks. The next step is to provide an owned or partner surface where the traveler can save, compare, explore, or ask questions without being forced immediately to checkout.

This involves a more disciplined decision-making process. Operators cannot be maximally present across every social platform, creator community, search surface, and media format. Each initiative should begin with a clear audience, the desired role in the customer journey, the expected traveler response, and a decision rule. Test on a limited basis, measure whether the idea helps travelers progress beyond attention, and then scale, adapt, or stop.

Reach, views, and clicks remain useful metrics, but they do not always show whether an idea gained momentum. Operators can also track saves, return visits, engagement with reviews, progression into planning, and eventual conversion. A campaign with modest reach but strong downstream movement may create more value than one that is widely seen and quickly forgotten.

Finally, the promise and the product are more powerful when they align. Marketing cannot manufacture inspiration if the underlying experience is generic, and the value of a strong idea is lost if the landing page ignores the story and proof that created the interest.

Design for the return, not only the first visit

The new customer journey requires platforms to assume that the traveler will leave, consult other sources, and then come back. Each return should begin from a more advanced decision state than the last.

The first step is to define a minimum viable trip state. This can include dates, budget, party composition, preferences, short-listed and rejected options, comparisons already made, and unresolved questions. A traveler should not have to remember which hotel was rejected because of location, which fare lacked flexibility, or which option another member of the group preferred.

That information must also be structured so it's usable. Browsing history records what happened, but structured memory can resume a comparison, flag a changed price or policy, prevent rejected options from resurfacing, and support collaboration across travelers and devices.

Operators can begin by solving for the highest-friction handoffs rather than trying to connect the entire ecosystem at once. Repeated searches, abandoned comparisons, customer service contacts, and traveler diaries can reveal where people reenter information or revisit the same question. Those friction points should be the first priorities for the product.

Measurement can extend beyond first-session conversion. Useful indicators include the share of returning travelers whose prior state is restored, the time required to reach the next decision, repeated searches for the same information, and the rate at which unresolved questions are closed.

Travelers will ideally understand what is being remembered and how it will be used. The goal is not to build an exhaustive profile, but to preserve enough context to make the next return easier.

Seek today's AI visibility—and prepare for tomorrow's AI execution

Operators can look to ensure that AI will find, represent, and book their products accurately, while also giving travelers enough transparency and control to confidently authorize the result.

The machine-facing work can begin with recurring audits of how the brand is represented on AI portals. Operators can test high-value traveler prompts across major AI tools and assess whether their products appear, how they are described, which sources are cited, and whether rates, policies, and availability are current. Gaps may require richer structured content, stronger third-party listings, more current reviews, clearer policies, or better distribution across the sources models use.

Execution requires a separate foundation: reliable inventory, machine-readable terms, booking APIs, and processes that identify and correct failures. Appearing in the answer is not enough if the transaction cannot be completed accurately.

The traveler-facing program can advance through a controlled delegation ladder. AI might first answer questions, then explain comparisons, assemble a short list, prepare an itinerary, place a reversible hold, and eventually complete a booking. Progression should depend on demonstrated accuracy, traveler acceptance, servicing needs, and recoverability. Every transactional use case can include the same trust controls: a clear explanation of why an option qualified, visible sources for material facts, review and confirmation before commitment, the ability to adjust or reverse the action, and access to a human when needed.

ROI can be evaluated by use case, not by AI adoption alone. Teams should compare AI-supported flows with existing processes when assessing conversion, error rates, servicing costs, abandonment, and time to decision. High engagement does not justify scaling if the process requires extensive manual repair.

Treat postbooking as a time of risk and opportunity

Confirmation changes the operating mode but does not end customer engagement. Once a booking is made, the provider holding it has its richest information about the traveler, trip, price, timing, and cancellation terms. At the same time, the traveler remains reachable by competitors. Postbooking strategy can therefore address both retention and acquisition.

The first step is to segment travelers by exposure and opportunity. Relevant signals may include booking lead time, cancellation flexibility, trip composition, acquisition source, loyalty status, price sensitivity, and itinerary completeness. A flexible family booking made months in advance presents a different retention risk—and switching opportunity—from a nonrefundable business stay booked for the following week.

Price monitoring should not be left entirely to metasearch tools or AI agents. If a public rate falls during the cancellation window, the booking provider might offer a rebooking path, credit, complimentary amenity, loyalty benefit, or explanation of the value already included. A competitor might instead surface a clearly better alternative and make the trade-off and switching process easy to understand.

The same model applies to itinerary gaps and disruption. Missing dining or activity plans can trigger curated recommendations or partner offers, whether or not the provider holds the primary booking. Weather, schedule, or destination changes can prompt useful alerts and adjustment options. Digital tools can handle routine needs, with human support available for more complex cases.

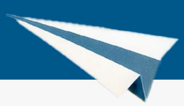
Measurement can focus on incremental value. Holdout groups and controlled tests can show whether an intervention reduced cancellations, won a switching traveler, protected net revenue, increased ancillary attachment, or improved loyalty. The cost of an amenity, discount, or acquisition offer can be compared with the margin preserved or gained.

Postbooking engagement works only when it is relevant to the traveler. It should not be an excuse to send generic messaging. Every intervention should resolve uncertainty, help protect or win the booking, or improve the trip.

The travel customer journey no longer resembles a path with a beginning, middle, and end. It is a set of overlapping orbits. Travelers move fluidly among social platforms, search engines, AI tools, reviews, and supplier sites, often pursuing several possible trips at once and revisiting decisions that might have seemed settled. Travel players that plan around the old linear model could find themselves a step behind where travelers actually are.

This shift rewards those who can earn credibility, reduces the restart tax travelers pay every time they switch channels, closes the gap between AI's growing role in discovery and its still-limited role in booking, and keeps travelers engaged after booking confirmation rather than treating it as the end of the relationship. None of this requires any single company to control the entire journey. But it requires a clear view of where an organization can plausibly earn attention and trust, as well as the discipline to invest there rather than everywhere.

The travelers in this research are not saying they want more options, more content, or more tools. What they want is continuity: to be recognized when they return, to have their questions answered without redundant effort, and to feel confident that the choice in front of them is sound—and reversible if it is not. The operators, platforms, and destinations that deliver on that can earn an enduring place in the traveler's orbit, wherever the next journey leads.



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