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State of Customer Experience in Travel & Hospitality in an AI-Driven World

A strategic guide to delivering seamless, personalized journeys across the travel lifecycle

Foreword

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In Travel & Hospitality (T&H), experience is the product and its value is being redefined by technology, data, and traveler expectations. Modern travellers expect more than seamless bookings or competitive pricing. They demand journeys that feel curated, responsive, and trustworthy, from the first social post they see to the moment they return home.

This report highlights ten strategic insights that reveal how Travel brands are adapting to these new dynamics. The findings show a clear pivot: social content and peer validation now drive decision-making, mobile is the primary starting point but not the end point, and AI is transforming both the traveler experience and the operational backbone of the industry.

Yet, the path to innovation is not without its challenges. Data silos continue to limit personalization, marketing functions are being pressed to directly drive revenue, and advanced martech capabilities remain underutilized. The brands that lead will be those that unify data, operationalize AI responsibly, and design experiences that anticipate traveler intent, across every touchpoint and device.

If you are navigating how to align your technology stack, elevate your marketing function, or modernize personalization efforts, this report offers benchmarks and strategies to help you seize the next wave of traveler loyalty and growth.

About the research

This report is based on global research conducted by Incisiv on behalf of Adobe in Q2 2025 to assess the state of digital transformation in the Travel & Hospitality Industry.

This report provides Top 10 industry specific insights that focus on strategic priorities and operational readiness across five critical dimensions: AI adoption, data integration, content scalability, organizational structure, and technology implementation.
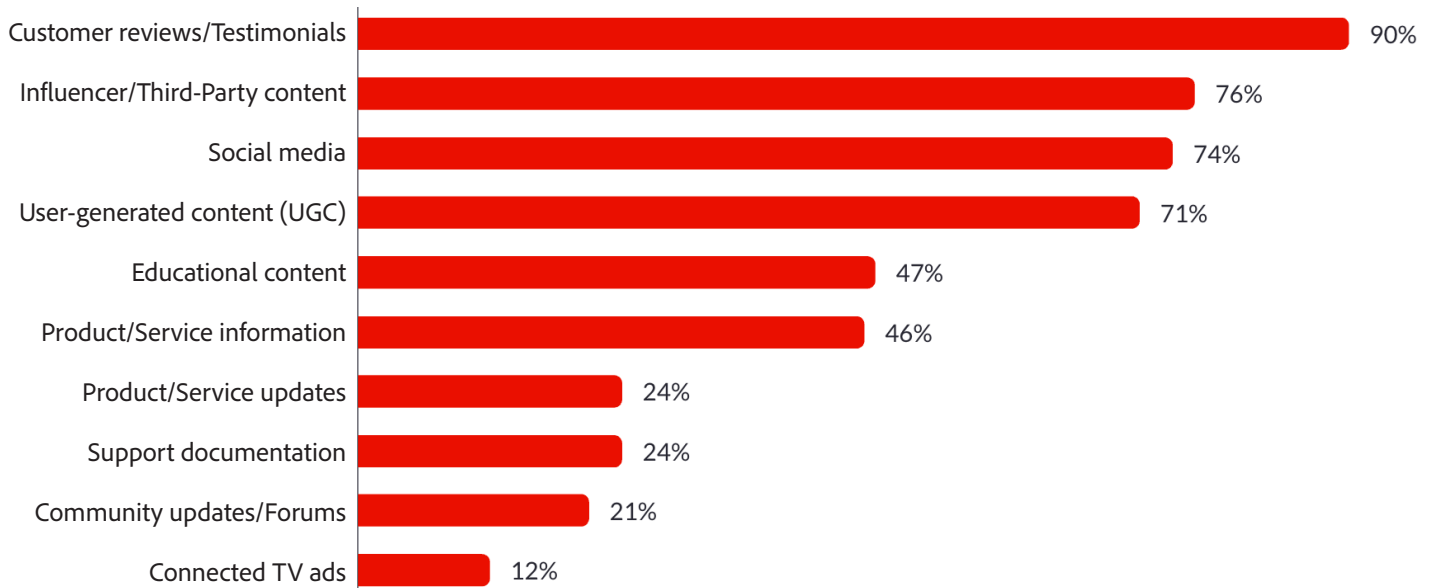
- 565 Travel & Hospitality leaders participated in the study

- 9 Markets (North America, South America, Western Europe, Central Europe, Middle East, India, South East Asia, Australia and New Zealand, Japan)

- 65% of respondents were from companies with over $1 billion in annual revenue

- 58% respondents were VP level or above

Social content now guides the travel decision-making process

90% of travel organizations report an increase in customer consumption of review/testimonial content

Content type	%
Customer reviews/Testimonials	90%
Influencer/Third-Party content	76%
Social media	74%
User-generated content (UGC)	71%
Educational content	47%
Product/Service information	46%
Product/Service updates	24%
Support documentation	24%
Community updates/Forums	21%
Connected TV ads	12%

Note: This chart shows the % change in content customers consume before making a purchase decision

Travel trust has shifted to the crowd

Travel decisions today are heavily influenced by social validation. Nearly nine in ten travellers now scour customer reviews and testimonials online before booking a trip, and roughly three-quarters consume more influencer or third-party content than they did in the past. This surge in peer and influencer validation signals a dramatic power shift: brand-owned narratives are taking a backseat to community voices. Travellers increasingly trust what other travellers share over traditional marketing, fundamentally changing how trust is built in the travel journey.

Social platforms now shape the booking journey

These shifting preferences are changing how trips are planned. Travellers now rely on social content to guide choices, from destinations to hotels and activities. Short-form videos with authentic travel stories (like quick tours and candid reviews) are key sources of inspiration. Gen Z and Millennials are driving this trend, using TikTok, Instagram, and YouTube for ideas, then sharing their own experiences. This creates a feedback loop where social content fuels more content and influence, one viral post can drive bookings or spotlight hidden destinations almost overnight.

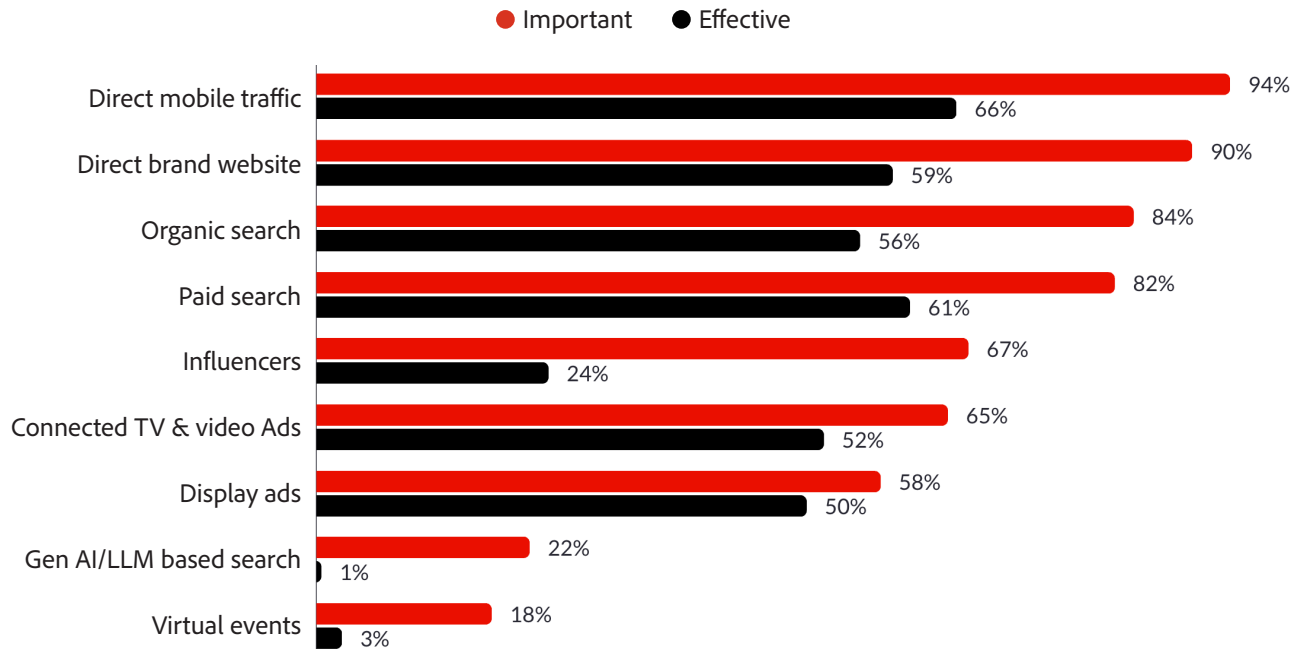## Winning with peer influence requires intentional strategy

In today's era of social validation, Travel and Hospitality leaders must evolve their strategies. Prioritize review management by encouraging and responding to feedback to build trust. Partner with authentic influencers and amplify user-generated content by featuring real guest stories in marketing. Develop content that's both localized and platform-native, tailored to each audience and channel. Finally, invest in real-time monitoring and social listening to track trends, respond quickly, and engage with communities, leveraging peer voices to boost brand credibility and influence travel decisions.

Channel fluidity redefines the travel booking journey

94% Of Travel & Hospitality executives say direct mobile traffic is rated as the most important acquisition channel.

● Important ● Effective

Channel	Important	Effective
Direct mobile traffic	94%	66%
Direct brand website	90%	59%
Organic search	84%	56%
Paid search	82%	61%
Influencers	67%	24%
Connected TV & video Ads	65%	52%
Display ads	58%	50%
Gen AI/LLM based search	22%	1%
Virtual events	18%	3%

Note: This chart shows the % for each channel by level of importance and by how effective companies are at personalizing it

Customer context is mobile-first, but conversion spans multiple devices

Today's travellers no longer move through a single channel or device when planning and booking their trips. They browse destination content on mobile apps, compare prices on aggregator sites, and often complete bookings via desktop for added comfort or functionality. This fluid movement between platforms reflects a larger trend: customers expect a cohesive experience regardless of how or where they interact with a brand. Whether they're researching a cruise, booking a boutique hotel, or revisiting a saved itinerary, consistency and continuity across touchpoints are essential to securing conversion.

Congruence across channels matters more than ever

While mobile is the most-used touchpoint, it's not always where conversions happen, especially for complex purchases like cruises or multi-leg trips. Travellers often start on mobile for convenience but switch to desktop for final decisions due to interface complexity or payment comfort. This doesn't reduce mobile's value, it highlights the need for seamless transitions. Data shows mobile apps and direct websites drive acquisition, but every touchpoint must reinforce the journey. Fragmented experiences drive abandonment when personalization and context fail to carry across channels.

Prioritize omnichannel continuity across devices

Travel brands must move beyond mobile optimization and create a seamless omnichannel experience that supports cross-device planning and booking. This means enabling persistent user profiles, synced carts and wishlists, and dynamic content that reflects past behavior. For example, a traveler who researches a package on mobile should see personalized prompts when switching to desktop. Platforms like Adobe help unify identity and engagement, reducing friction, boosting booking confidence, and ensuring relevance, no matter where the traveler chooses to engage or complete their journey.
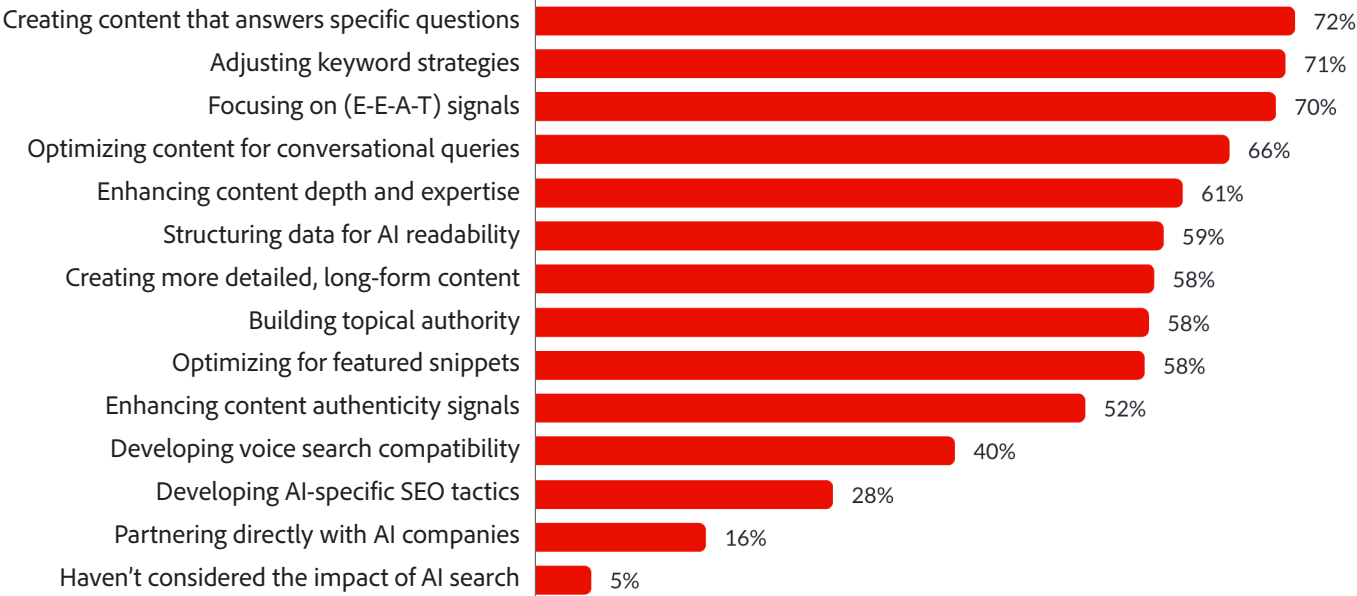
AI search will accelerate the shift toward journey-centric content

Travel leaders expect **22%** of organic search volume is expected to shift to AI-powered search in the next 24 months

Strategy	Percentage
Creating content that answers specific questions	72%
Adjusting keyword strategies	71%
Focusing on (E-E-A-T) signals	70%
Optimizing content for conversational queries	66%
Enhancing content depth and expertise	61%
Structuring data for AI readability	59%
Creating more detailed, long-form content	58%
Building topical authority	58%
Optimizing for featured snippets	58%
Enhancing content authenticity signals	52%
Developing voice search compatibility	40%
Developing AI-specific SEO tactics	28%
Partnering directly with AI companies	16%
Haven't considered the impact of AI search	5%

Note: This chart shows the % brands adjusting their search strategy for AI-powered discovery

Shifting the discovery paradigm

AI-powered discovery is transforming how travellers search, moving beyond keyword SEO toward context, specificity, and credibility. Queries like "Best eco-lodges near Ubud for a digital detox" now demand instant, trustworthy, tailored content. Brands that fail to adapt risk becoming invisible as engines shift from listing pages to summarized answers. To stay relevant, they must invest in structured, long-form content with metadata titles, descriptions, and content cards that ensure visibility in AI-driven discovery.

Curating for the research journey

Most travel brands have historically focused on post-decision content, offers, pricing, booking engines, rather than inspiration and research. But AI search is amplifying the early stages of the journey, where travellers seek answers, compare experiences, and validate decisions. Today's travellers expect curated guides like "7-day self-drive in Tuscany," not just a product page. Brands must realign to this journey-centric mindset, supporting the traveler through dreaming, planning, and decision-making phases with deeply informative, human-centered content.

Building for future discovery

To remain discoverable, brands must now align with what AI models reward: Experience, Expertise, Authoritativeness, and Trustworthiness (E-E-A-T). That means showcasing local knowledge, publishing first-hand insights from real travellers or experts, and providing consistently accurate information. For example, a luxury resort in Santorini should not only display amenities, but also offer an expert-authored travel guide, destination FAQs, and reviews from returning guests. AI search engines will favor brands that build topical authority and trust, not those relying on outdated optimization techniques.

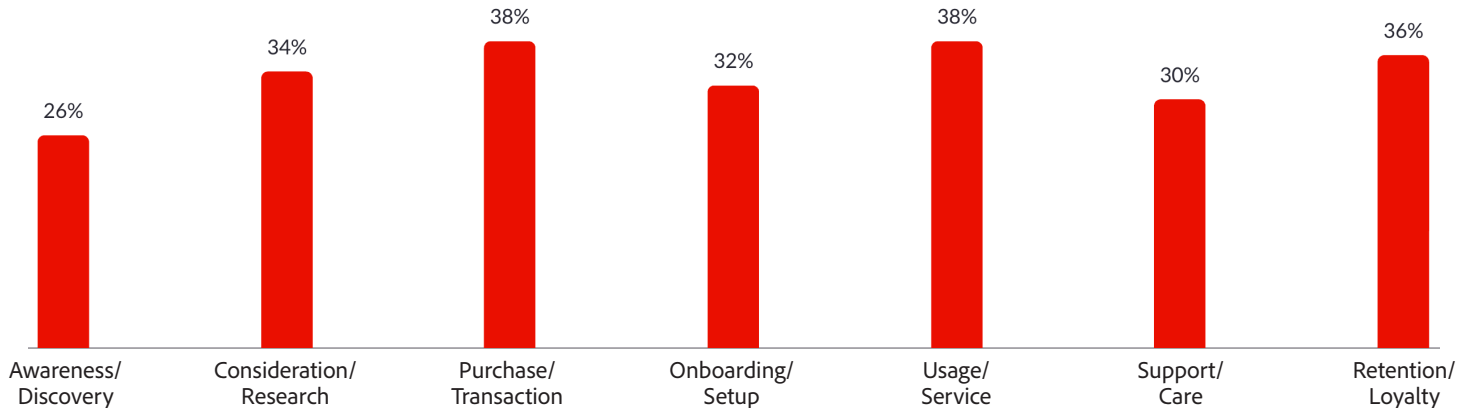# Data integration failures crippling personalization potential in travel

Despite
85%
of executives acknowledging that travellers expect personalized experiences

Only
3%
of customer data is fully integrated, limiting personalization efforts across the traveler journey

Data silos are directly limiting personalization across the traveler journey.

Awareness/ Discovery	Consideration/ Research	Purchase/ Transaction	Onboarding/ Setup	Usage/ Service	Support/ Care	Retention/ Loyalty
26%	34%	38%	32%	38%	30%	36%

Note: This chart shows the % of current level of personalization across the entire customer journey

The experience expectation gap is growing

Modern travellers expect brands to anticipate their needs, provide tailored offers, and deliver seamless service across channels. Yet this is fundamentally impossible when nearly all customer data remains fragmented or locked away in silos. Whether it's a loyalty member booking a last-minute upgrade or a returning guest seeking personalized dining options, the lack of real-time, unified data access undermines every touchpoint of the experience. With 85% of leaders acknowledging the expectation for personalization, the current infrastructure gap is not just a tech challenge-it's a strategic liability.
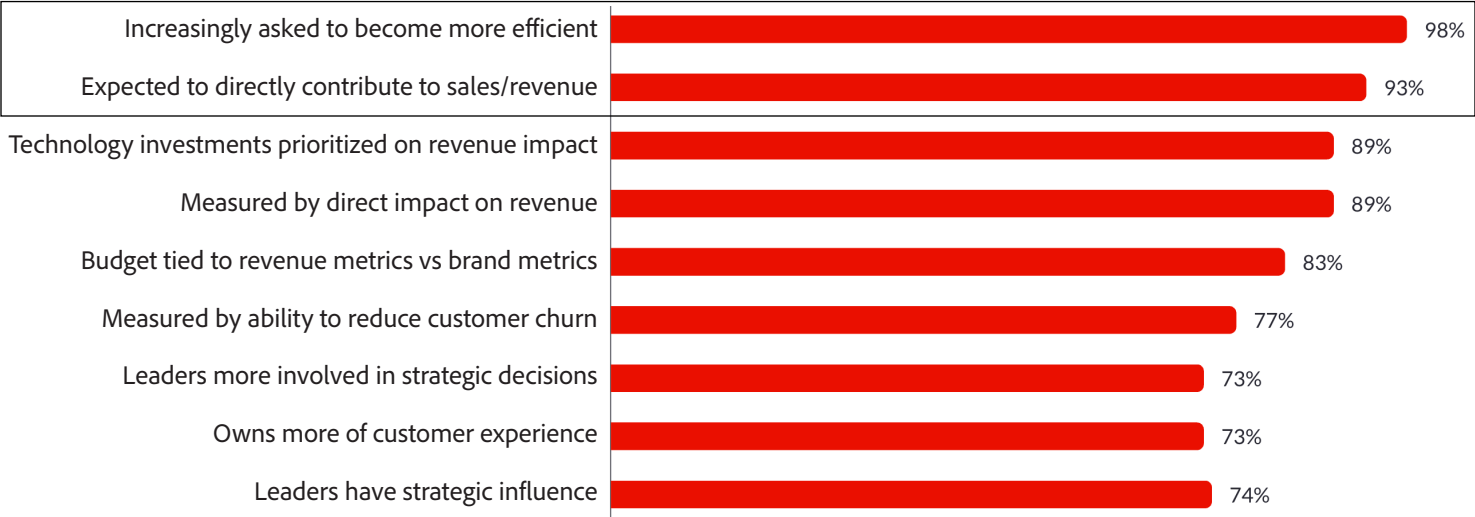
Siloed data = missed moments across the journey

From trip inspiration to in-destination services, the traveler journey is a blend of digital and physical interactions. Without integrated data, travel brands struggle to recognize the same customer across platforms or respond to behavioral signals in context. A traveler browsing luxury cruises on mobile might receive irrelevant email offers or be asked to repeat information when calling support. These disconnected experiences erode trust and fall short of rising expectations for omnichannel consistency, cited by 74% of executives. Journey-centricity requires unified intelligence across every phase of the experience.

Turning data readiness into competitive differentiation

As AI, personalization engines, and predictive analytics become standard in travel CX stacks, brands that fail to resolve their data infrastructure will fall further behind. Those who invest in harmonizing their customer data can unlock high-precision personalization, power agentic automation, and eliminate friction at every stage, from upsell prompts to proactive service alerts. With only 3% of T&H brands currently fully integrated, the window for early mover advantage is still open, but not for long.

Marketing becomes the growth engine of Travel and Hospitality

98%
of T&H marketing leaders say they're being asked to become more efficient

93%
of T&H marketing leaders say they're expected to directly contribute to revenue

Statement	%
Increasingly asked to become more efficient	98%
Expected to directly contribute to sales/revenue	93%
Technology investments prioritized on revenue impact	89%
Measured by direct impact on revenue	89%
Budget tied to revenue metrics vs brand metrics	83%
Measured by ability to reduce customer churn	77%
Leaders more involved in strategic decisions	73%
Owns more of customer experience	73%
Leaders have strategic influence	74%

Note: This chart shows the % of brands that agree with the statements

Travel's growth strategy now runs through marketing

Marketing is no longer a downstream function in the Travel and Hospitality sector. As demand rebounds and operational costs climb, brands are placing greater pressure on marketing teams to deliver measurable business impact. Campaigns once evaluated by awareness or engagement are now scrutinized through the lens of sales conversion, occupancy lift, and return on ad spend. The shift isn't just about optimization, it's a redefinition of marketing's role in driving the guest booking journey and sustaining post-stay value.

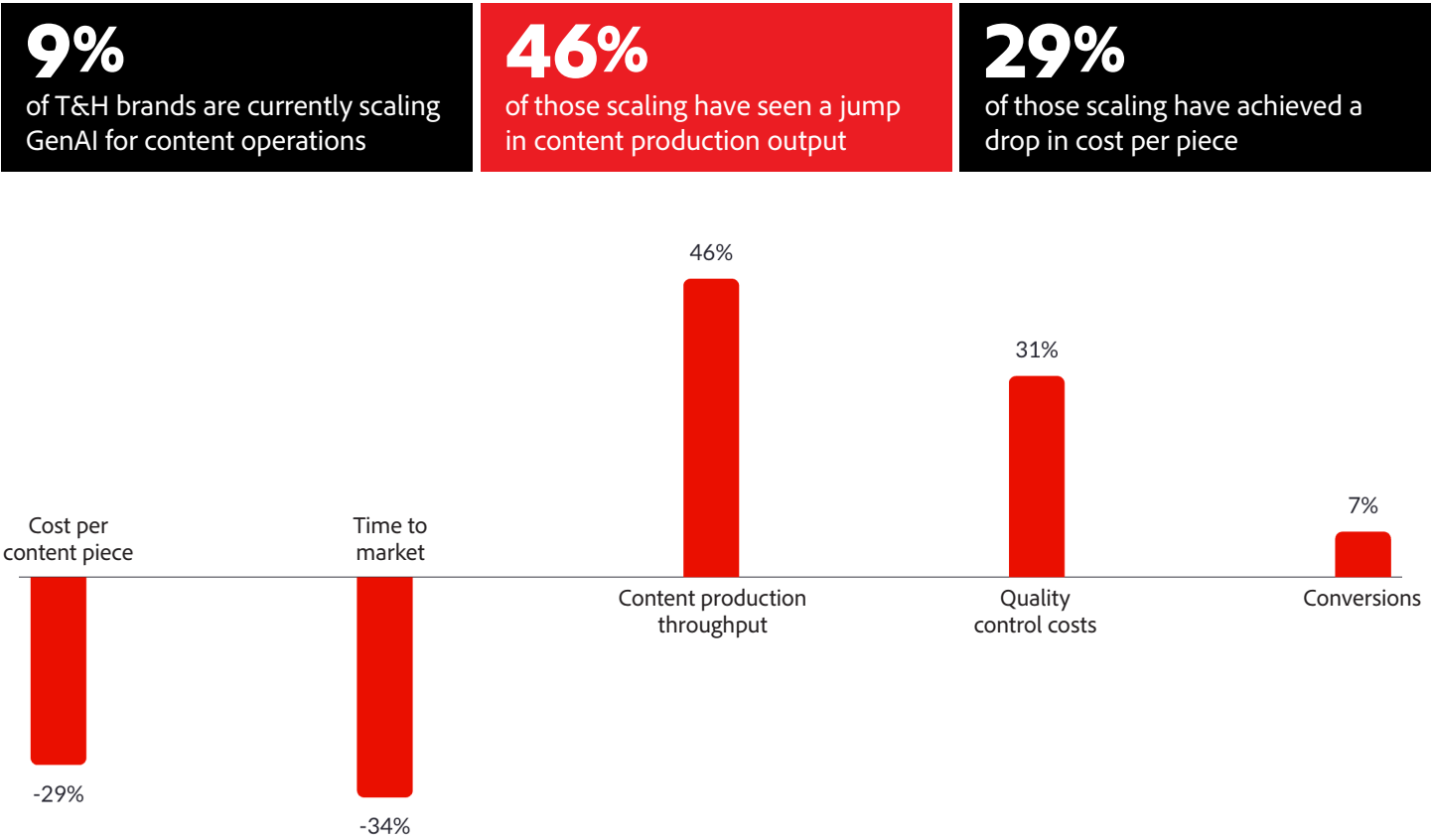### Performance KPIs are replacing traditional metrics

Revenue-linked metrics like revenue per available customer (RevPAC), cost per acquisition (CPA), and return on ad spend (ROAS) have long been part of the marketer's playbook. What's new is the heightened pressure from CFOs and boards to justify every dollar of spend against tangible business outcomes. Legacy measures such as brand lift or broad reach carry less weight when budgets are under the microscope. This renewed accountability is not just influencing dashboards—it is reshaping team priorities, tech investments, and how marketing earns credibility internally.

Operationalize marketing as a revenue system

To meet rising expectations, Travel and Hospitality leaders must rethink how marketing aligns with commercial strategy. This means building frameworks that tie media spend to bookings, loyalty, and long-term guest value. AI can help quantify incrementality, identifying what drives first-time vs. repeat bookings and where media spend delivers the highest return. As performance becomes marketing's new language, brands that invest in measurement and attribution infrastructure will be best positioned to lead the next wave of profitable growth.

Generative AI changes the economics of travel content

9%
of T&H brands are currently scaling GenAI for content operations

46%
of those scaling have seen a jump in content production output

29%
of those scaling have achieved a drop in cost per piece

Note: This chart reflects how Generative AI has influenced content production efficiency and costs

Fueling omnichannel engagement at scale

In Travel and Hospitality, content is more than messaging, it's the experience. From immersive destination imagery and seasonal offers to dynamically updated booking guides, brands must generate high-quality content across multiple platforms, languages, and customer segments. Generative AI unlocks this scale, enabling faster production of tailored, intent-driven experiences across search, social, and owned channels, helping brands engage travellers earlier and more frequently across their booking journey.

Content acceleration creates new operational pressures

While GenAI accelerates production, it also increases the volume and complexity of content requiring oversight. Travel brands must now monitor thousands of AI-generated variants for factual accuracy, cultural appropriateness, and brand alignment. Inaccurate descriptions of cancellation policies, visa requirements, or property amenities can lead to poor guest experiences and reputational damage. The growing cost of quality control reflects this emerging operational burden, where speed must be balanced with trust.
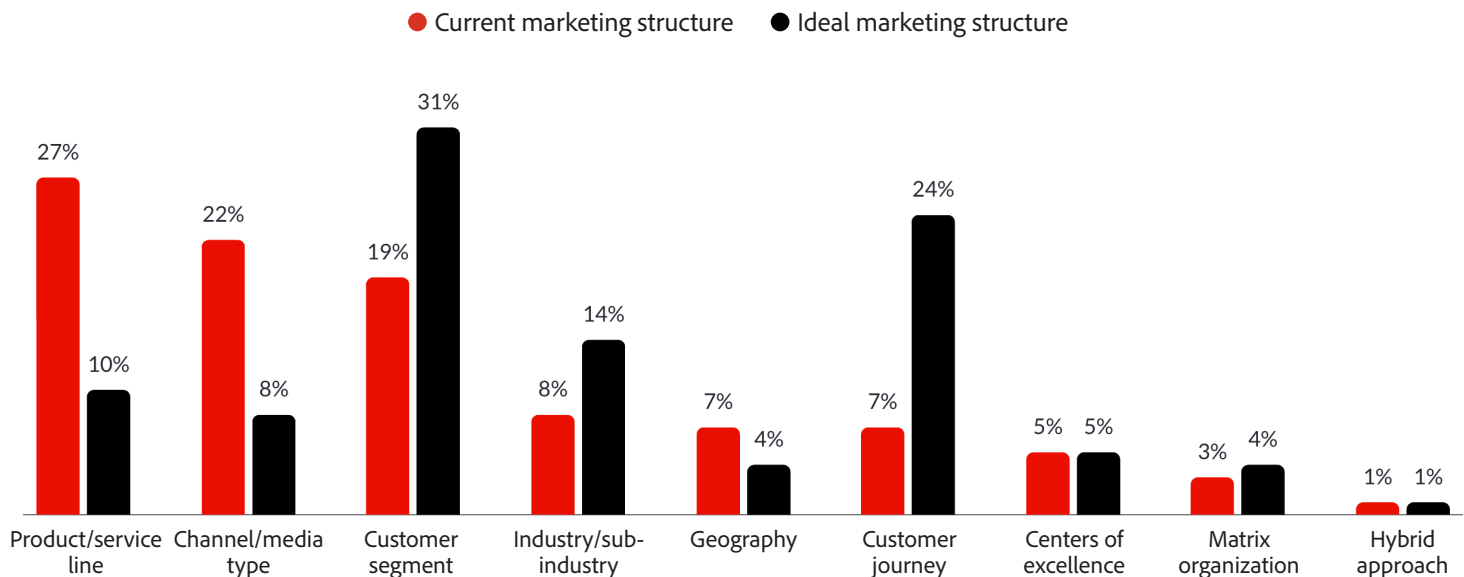
Operationalize accuracy through feedback and analytics

As AI-generated content becomes standard, travel organizations must build continuous improvement into their content operations. This means capturing traveler feedback, content performance, and error signals across touchpoints, then feeding that data into editorial refinement processes. Aligning content creation with live traveler context, such as trip stage or behavior patterns, ensures greater relevance and reduces rework. Over time, this creates a self-improving system where content becomes smarter, safer, and more effective.

Outdated marketing structures are blocking traveler-centric growth

Only 7%
Travel orgs are structured around the customer journey

When,
24%
say this should be the ideal

19%
are organized by customer segment, when 31% say it is ideal

● Current marketing structure ● Ideal marketing structure

Category	Current	Ideal
Product/service line	27%	10%
Channel/media type	22%	8%
Customer segment	19%	31%
Industry/sub-industry	8%	14%
Geography	7%	4%
Customer journey	7%	24%
Centers of excellence	5%	5%
Matrix organization	3%	4%
Hybrid approach	1%	1%

Note: This chart shows current and ideal marketing organization structure

The journey to personalization starts with organizational design

As travellers demand seamless, hyper-personalized experiences across the booking, stay, and loyalty journey, organizational structure has become a silent barrier. Yet most travel brands remain anchored in outdated models, organized by product line, geography, or media channel. This internal fragmentation stands in stark contrast to guest expectations, where fluidity across digital and in-person touchpoints is assumed. The structure isn't just operational, it directly impacts a brand's ability to engage meaningfully and consistently across the journey.

Structural inertia is slowing transformation

Travel marketers see customer-centric structures as the ideal, but progress is slow. Only 7% of organizations are currently structured around the customer journey, though 24% believe they should be. A similar gap exists for segment-based models, reflecting intent to prioritize guest needs over legacy structures. Yet foundational barriers stall change, top challenges include securing transformation budgets, integrating data, reconciling legacy and new tech, and breaking down silos. These interlinked roadblocks limit an organization's ability to rewire its model around the traveler lifecycle.

Break silos by tackling foundational barriers first

To overcome structural inertia, Travel and Hospitality brands must move toward operating models designed around the guest, not the org chart. This means embedding journey logic into team structures, metrics, and incentives. Leading firms are piloting cross-functional squads that span loyalty, digital, and on-property operations, focused on unified KPIs like guest lifetime value or conversion per trip. Others are assigning journey owners to steward continuity from booking through post-stay engagement. The path forward doesn't require overnight reorgs, it requires designing for outcomes, not functions.
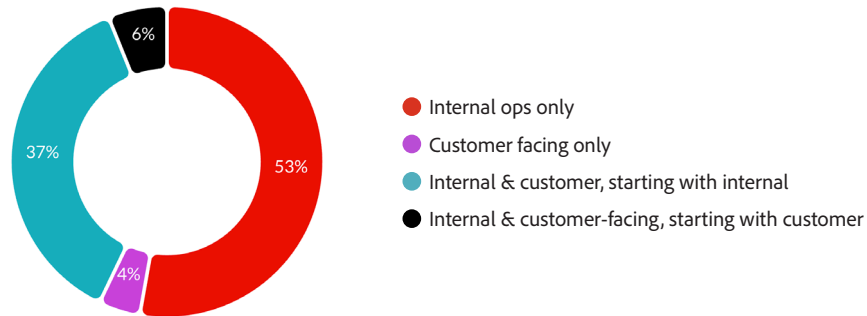
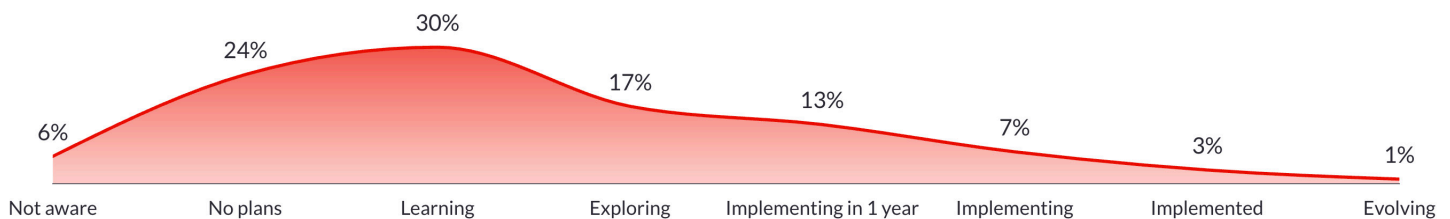# AI-powered travel assistance emerges as competitive battleground

53%
of T&H orgs are applying agentic AI only to internal operations

67%
are actively exploring, learning, or implementing Agentic AI capabilities

- Internal ops only
- Customer facing only
- Internal & customer, starting with internal
- Internal & customer-facing, starting with customer

53%

37%

4%

6%

Note: This chart highlights key areas where organizations are prioritizing the implementation of Agentic AI

Not aware	No plans	Learning	Exploring	Implementing in 1 year	Implementing	Implemented	Evolving
6%	24%	30%	17%	13%	7%	3%	1%

Note: This chart shows the % of an organization's awareness and plans for Agentic AI and adoption

AI-powered travel assistance is redefining the guest journey

The next evolution of travel personalization is being led by intelligent service agents. From digital concierges to virtual guides, travel brands are now expected to deliver assistance that is responsive, context-aware, and deeply integrated across the booking and travel experience. This shift is especially important in a sector where guests expect seamless, in-the-moment support, from checking into a hotel early to managing itinerary disruptions in real time. As Agentic AI capabilities mature, travel brands are embracing them to enhance service and elevate the overall perception of hospitality in the digital age.

Customer support agents are taking the lead in agentic AI adoption

Travel organizations see AI-powered customer assistance as the most immediate, high-impact use case for Agentic AI. These agents autonomously manage a wide range of traveler queries, freeing human agents for complex needs and delivering 24/7 multilingual support at scale. Their value extends beyond convenience, they reduce wait times, simplify trip changes, and upsell relevant experiences, driving both loyalty and revenue. This early investment focus signals that travel brands view intelligent service as a critical advantage in guest experience innovation.

Reimagine service models and operationalize agent data for growth

To harness the full value of AI-powered travel assistants, hospitality leaders must go beyond front-end deployment. Service models need to be reimagined to integrate these agents across apps, websites, and physical touchpoints. Just as important is capturing and analyzing every interaction to feed enterprise data models. This demands tight coordination between marketing, service, and analytics teams to turn AI insights into action. When done right, Agentic AI enhances traveler experiences and creates a scalable foundation for operational intelligence and ongoing improvement.

AI governance gap, a significant risk exposure for travel providers

Validation before expanding Agentic AI

- 84% demand a security audit
- 73% require regulatory compliance review

How GenAI adoption changes marketing

- 84% plan to build AI governance and quality control protocols
- 80% will establish AI safety and ethics protocols

Foundational elements for AI readiness

- Only 20% have data governance frameworks in place
- Just 8% have AI governance frameworks currently implemented

Gen AI oversight & review layers

- 41% report multiple layers of review for GenAI-generated content
- 46% need AI assisted quality control with human checkpoints

Governance gap widens as AI proliferates

As travel brands adopt GenAI for personalization, pricing, and content, most do so without adequate safeguards. Many lack formal AI governance, with key measures like compliance protocols, risk management, and accountability frameworks still underdeveloped. This is especially risky in travel, where sensitive data like passports, itineraries, and payments are involved. Without clear guidelines for how AI tools are trained, deployed, and monitored, even well-meaning use cases can result in biased recommendations, data misuse, or inconsistent guest experiences, undermining trust in an experience-driven industry.

Intent is high, but execution is lagging

The disconnect isn't due to lack of awareness, over 80% of travel organizations plan to establish AI governance and quality controls within 24 months. But intent hasn't led to action, creating an implementation gap that leaves them exposed. Many prioritize speed-to-market over the controls needed for long-term trust and reliability. While investments in content automation and prompt engineering grow, few have updated approval processes or retrained teams. This lack of oversight risks flawed recommendations or privacy breaches, issues that can quickly escalate in an experience-driven industry.

Trust must be engineered into every AI touchpoint

Today's travellers expect more than convenience, they expect accountability. Data privacy now ranks with transparency, brand consistency, and personalization. AI can support these expectations, but only with responsible governance. Without strong frameworks for ethical use, lifecycle oversight, and human-AI interaction, trust erodes. Leaders must move beyond experimentation and adopt enterprise-wide governance to ensure AI is secure, explainable, and fair. In a competitive market, governance isn't just compliance, it's a differentiator that builds credibility and strengthens next-gen travel experiences.
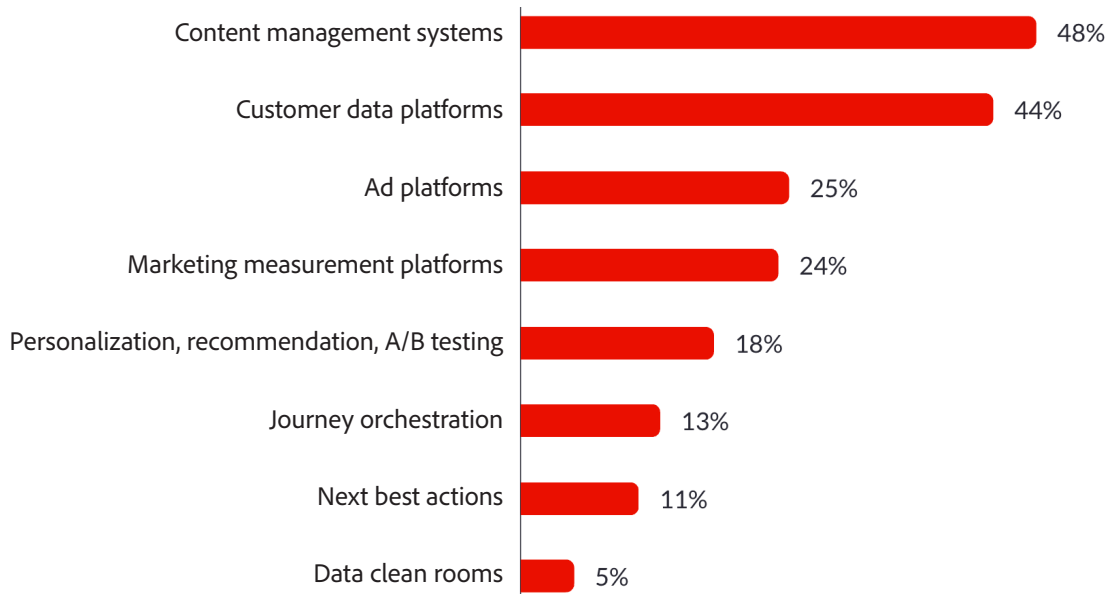
Advanced MarTech deficits are holding travel back

55%
say that their marketing stack will be ready for campaign planning in the next 24 months

Only 5%
of brands are ready to activate data clean rooms in the next 24 months

Category	%
Content management systems	48%
Customer data platforms	44%
Ad platforms	25%
Marketing measurement platforms	24%
Personalization, recommendation, A/B testing	18%
Journey orchestration	13%
Next best actions	11%
Data clean rooms	5%

Note: This chart outlines the % of companies that believe that their martech stack will meet needs over the next 24 months

Too few are ready for true journey personalization

Only a small fraction of travel companies believe their current marketing tech stack will meet future needs, just 13% for journey orchestration, 11% for next-best-action systems, and 5% for data clean rooms. These tools are essential for enabling real-time personalization across fragmented traveler journeys. Without them, brands remain stuck in transactional messaging, unable to adapt across research, booking, in-trip, and post-trip stages. While CMS and campaign tools are common, they no longer differentiate. The future belongs to brands that act on intent across moments, not channels.

Collaboration will be the new competitive advantage

Data clean rooms are more than privacy-preserving tools, they're gateways to next-gen brand partnerships. By enabling secure data collaboration, they let travel brands create richer, more seamless experiences beyond their own channels. For example, a hotel and airline can jointly target high-intent travellers using shared insights, without compromising privacy. Yet only 5% of brands are ready to activate this level of intelligence. As traveler loyalty becomes harder to maintain, those that extend their reach through partnerships will build stronger ecosystems, and greater influence.

The MarTech gap will define industry winners and losers

This shortfall in advanced marketing technology is creating a widening competitive gap. While some brands advance toward real-time personalization and orchestration, most still depend on disconnected platforms not built for cross-channel agility. The stakes are high: without these capabilities, brands risk invisibility in critical moments. Success will hinge on turning data into coordinated action, across teams and the broader travel ecosystem. In a landscape where experience is the differentiator, an outdated tech stack isn't just a systems issue, it's a barrier to growth.

Conclusion

The future of Travel & Hospitality will not be defined by booking volumes or price wars. It will be defined by how intelligently, contextually, and seamlessly brands engage travellers at every moment of the journey.

This research reveals a directional shift:

- Social validation drives trust and conversion. Peer reviews, influencer content, and user-generated media now carry more weight than brand messaging, making transparency and community engagement non-negotiable.

- Data integration is the foundation of personalization. Without unified Traveler profiles, brands cannot deliver relevant offers or experiences that match rising expectations.

- AI is both a content and service accelerator. Generative AI and Agentic AI are reshaping content operations, customer support, and journey discovery, but require robust governance and accuracy frameworks.

- Marketing is a growth engine, not a cost center. Travel brands must align marketing efforts directly to bookings, loyalty metrics, and lifetime guest value.

- Omnichannel orchestration wins the Traveler journey. Mobile, desktop, social, and physical experiences must feel cohesive, persistent, and personalized across all touchpoints.

Strategic priorities for Travel and Hospitality leaders

1. Elevate traveler trust through social and peer-driven strategies. Proactively manage reviews, amplify user-generated content, and build authentic influencer partnerships.

2. Unify customer data to unlock journey-centric personalization. Invest in integrated data platforms that enable dynamic targeting, cross-device continuity, and predictive engagement.

3. Operationalize GenAI with quality control and traveler context. Leverage GenAI for scalable content creation and smart customer assistance, while embedding oversight and feedback loops.

4. Recast marketing as a commercial driver. Connect media spend to occupancy, repeat bookings, and guest lifetime value, using real-time performance analytics to optimize impact.

5. Close the martech gap for real-time orchestration. Implement next-best-action systems, journey orchestration tools, and data clean rooms to enhance partnerships and personalization.

6. Move beyond product or channel silos to an audience-first approach to how brands organize. Leading brands are restructuring around customer segments and end-to-end journeys, often through pod-based teams that unify marketing, sales, and service enabling faster responses to traveler needs and deliver more consistent experiences.

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