



How to Win

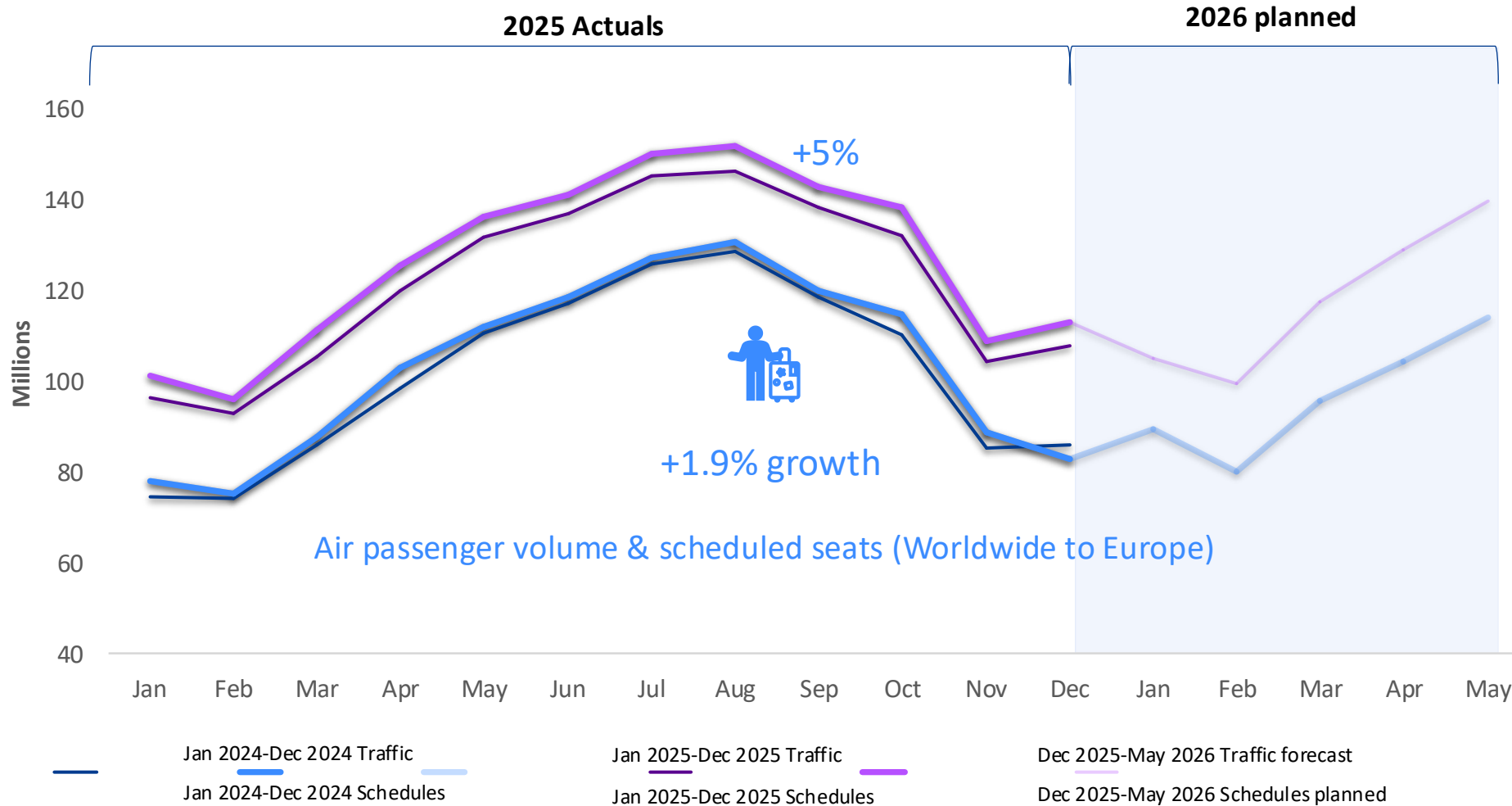
# The Traveler of 2026

**amADEUS**

Amadeus. It's how travel works better.

# Air capacity and passengers into Europe

## From Worldwide to Europe YoY



### Key highlights:

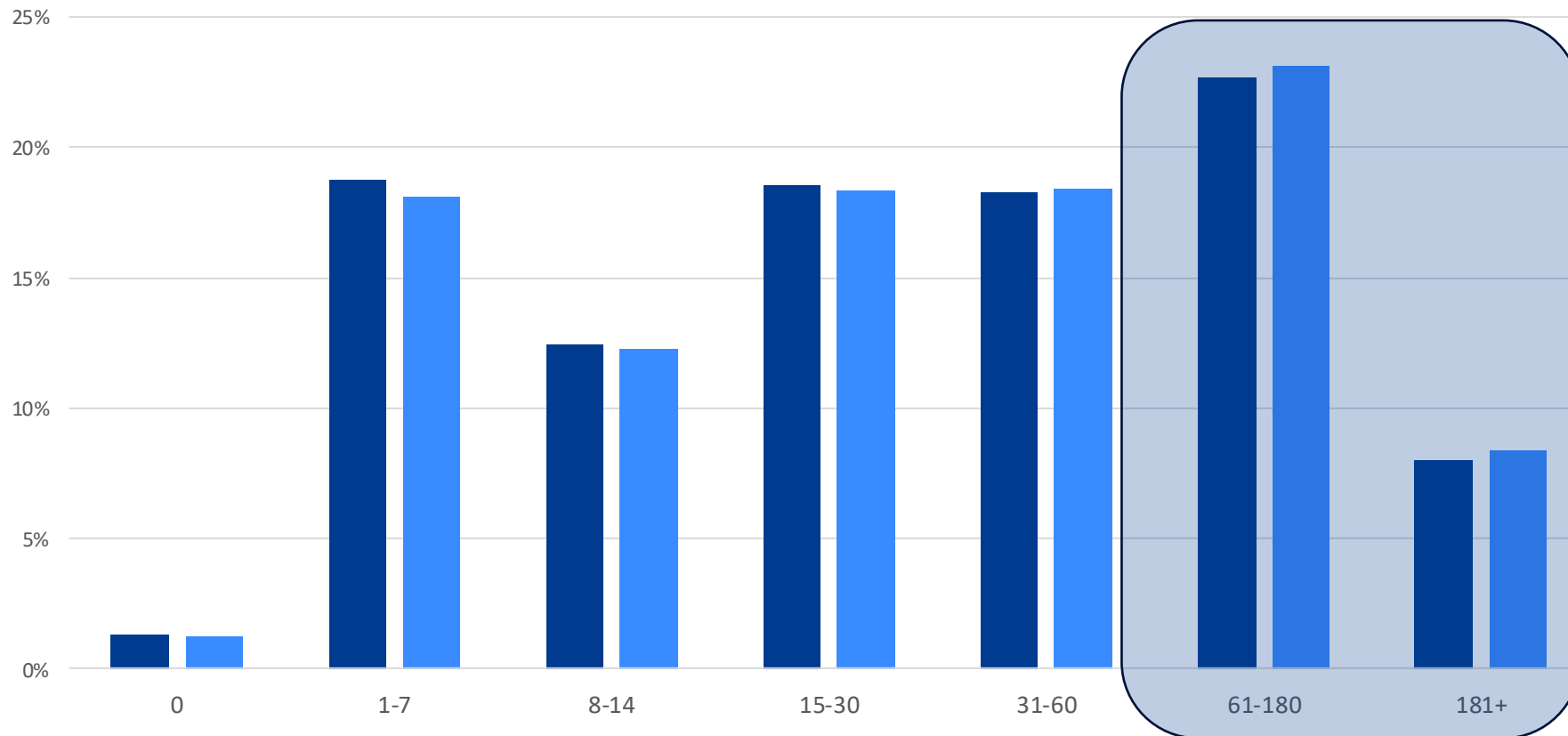
- Europe shows a healthy growth in airline capacity
- Passenger traffic is growing at a slightly slower pace (+1.9%).
- Asia leads long-haul traffic into Europe, accounting for 13% of all flights – slightly ahead of North America at 12%.

# Booking trends for Europe flights

## Lead time in days

Percentage of passengers booked

■ Jan 2024-Dec 2024    ■ Jan 2025-Dec 2025

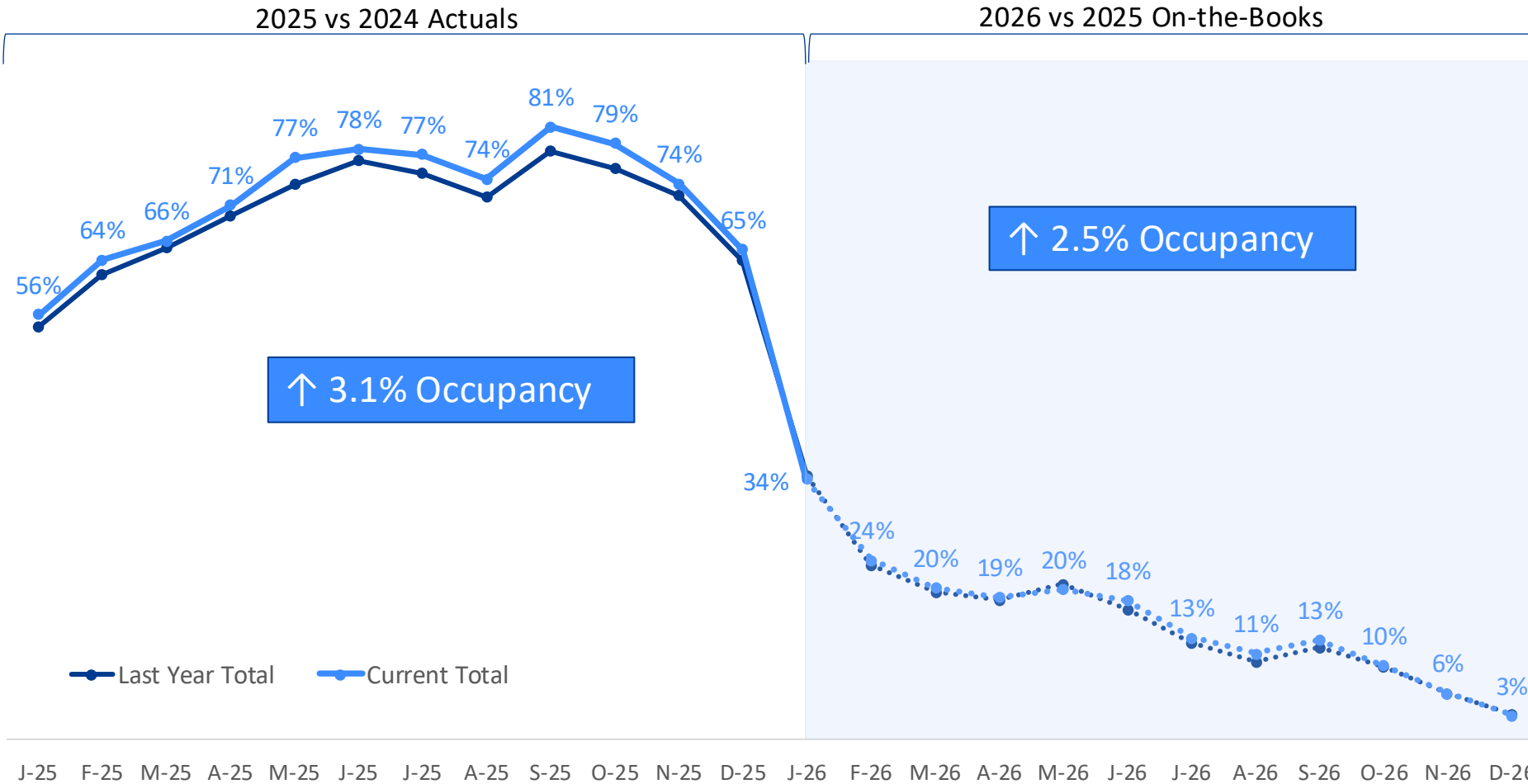


### Key highlights:

- Almost one in three trips to Europe are booked over two months in advance.
- Longer booking windows are becoming more common each year.
- Only 20% of air bookings are within 7 days of travel.

# Europe hotel occupancy

## 2025 vs 2024 Actuals & 2026 vs 2025 On-the-Books

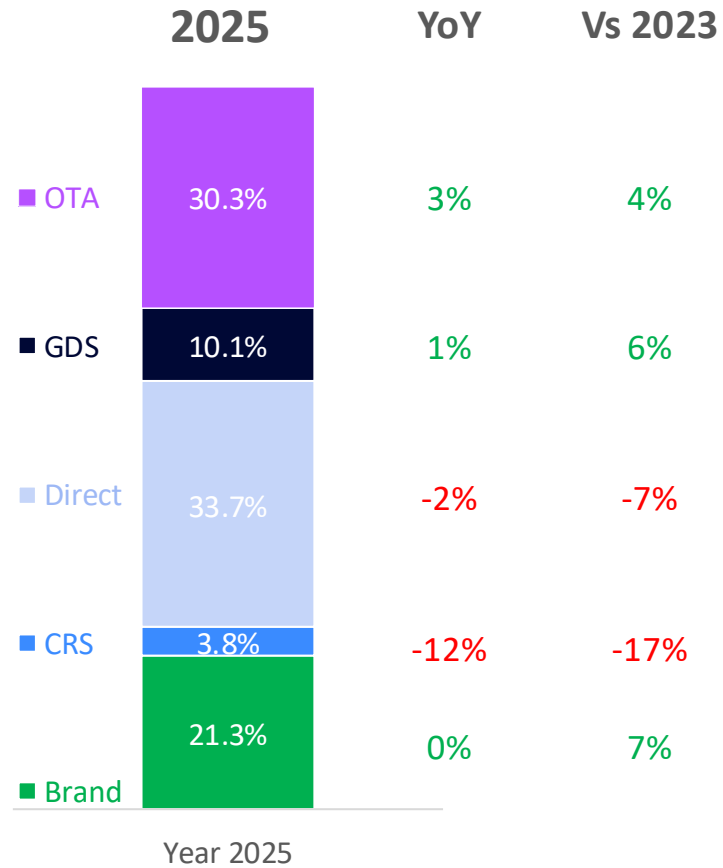


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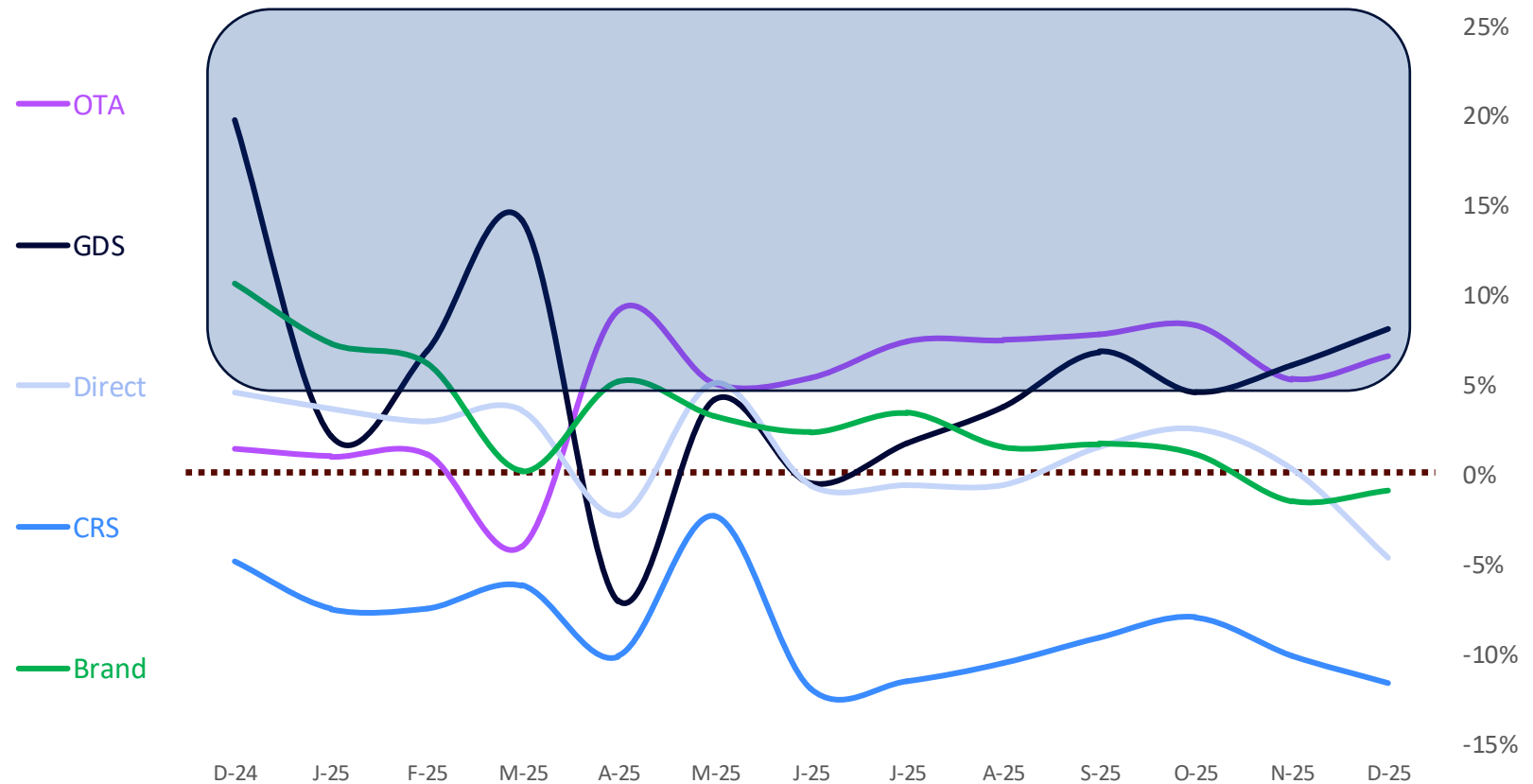
- Occupancy is rising across Europe
- South Pacific, Middle East, and South America growing too.
- Within Europe: Eastern Europe and the Nordics are seeing growth, Southern Europe's pace is slowing, and growth in the UK and Central Europe is declining.

# How are hotels being booked in Europe?

GDS and OTAs are the fastest growing channels in Europe

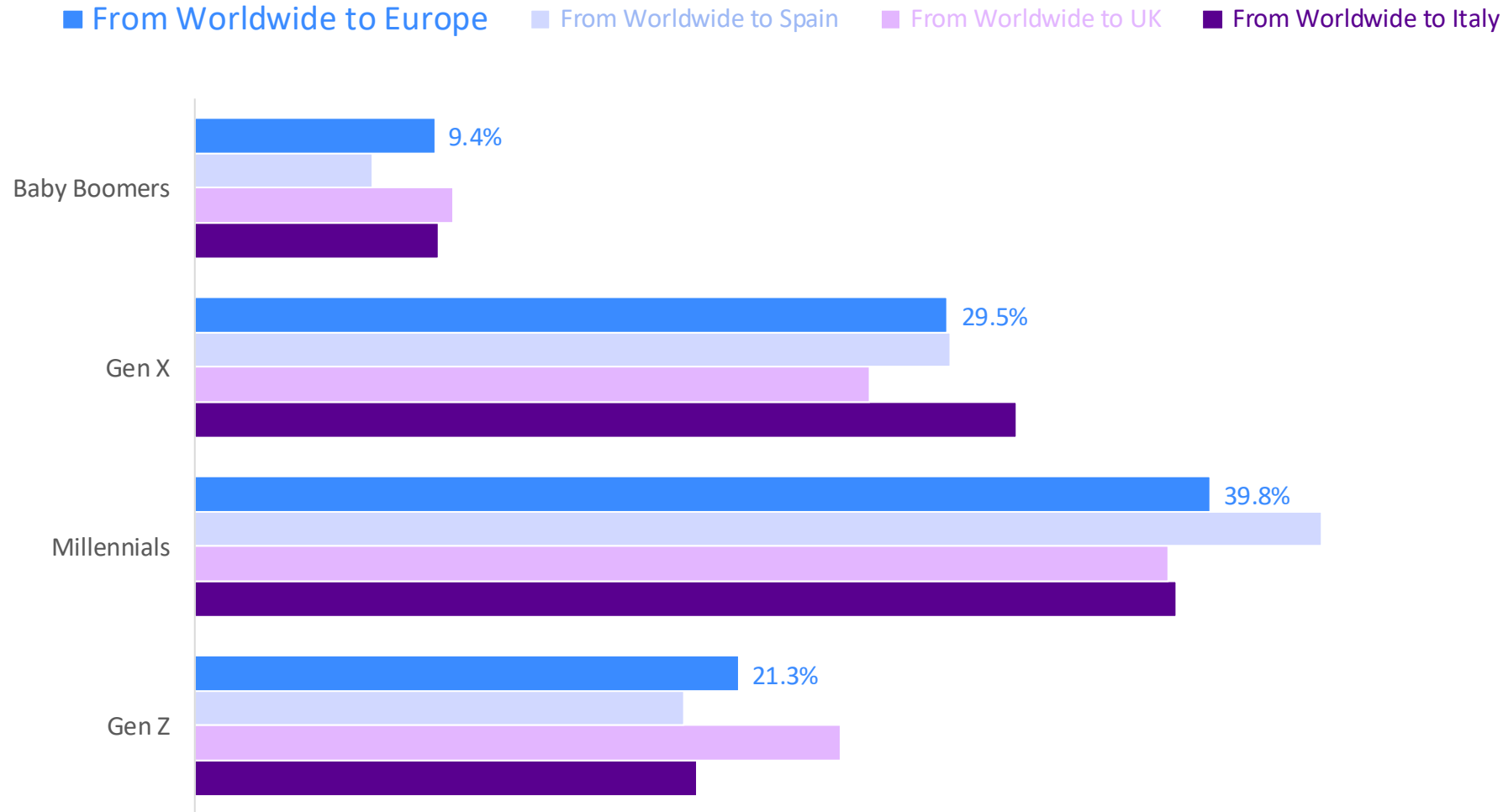


Hotels Booking channels & 12-month growth



# Who is flying into Europe

## Millennials and Gen Z account for +60%



### Key highlights:

- Generational succession is happening now: more Millennials traveling than ever before.
- Both Millennials and Gen-Z follow a similar pattern, with 3x trips per year and shorter stays.
- Looking for off-peak seasons, more experiences and alternative destinations.


# Where the industry is headed

Hyper-personalization will be key to driving demand in 2026



**60%**  
of bookings are **mobile**.  
Inspiration happens **across many platforms** – raising complexity.

**40%**  
of travelers look to social media ads as a source of inspiration

  
**20% → 29%**  
Influencer-driven content  
(Vs 5 years ago)

**52%**  
of travelers **share personal data** for tailored offers. Willing to pay **+12% above ADR** for premium amenities.

**Agile marketing matters:**

 of hotel bookings are made within 7 days of arrival

 of air bookings are made within 7 days

# Booking behavior is shifting

Attribute-based selling has become an essential merchandising strategy



**Retail-inspired  
model**

- Move **beyond traditional room sales**.
- Unlock new value through **bundling, personalization, and dynamic merchandising**.



**Upselling +  
experience  
packaging**

- The **hotel and destination** need to be merchandised together.
- **Flexible options and curated enhancements** deepen the guest connection.



# Technology as an Accelerator

To compete today, you need a **tech stack** that is:



## Scalable

Your business grows and your platform must scale with it.



## Resilient

Challenges happen and strong systems learn and bounce back.



## Secure

Threats are real and security is non-negotiable.

**Invest in a resilient platform that enables digital merchandising and hyper-personalization.**

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Thank you!

Let's stay connected:  
...@amadeus.com



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