iSeatz®

THE MODERN TRAVELER 2025:

DECODING THE PREFERENCES, MOTIVATIONS, AND TRENDS IN BOOKING AND TRAVEL

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THE iSEATZ PERSPECTIVE

The travel industry never sits still. It is constantly evolving, shaped by shifting consumer expectations, rapid advancements in technology, and a growing demand for more meaningful experiences.

Since the pandemic, people have been rethinking how they spend their time and money. According to McKinsey, more than half of Gen Z now say they prioritize experiences over material goods, a notable increase compared to older generations. Skift's latest State of Travel Report reinforces this shift, noting that 31% of U.S. travelers are now investing in luxury experiences—up four points from last year—and that demand for experience-driven travel is rising fastest among younger travelers. The report also highlights a broader move away from destination-first planning, with travelers curating their trips around immersive events, cultural experiences, and moments of personal meaning rather than traditional sightseeing alone.

At iSeatz, we wanted to understand *why* these shifts are happening. For our annual survey, we set out to understand today's traveler at a deeper level: what they prioritize, how they plan, and what drives their decisions from the moment inspiration strikes to the moment they book. What we found confirms just how quickly the landscape is changing.

Today's travelers are not just choosing destinations. They are navigating a digital journey from discovery to booking, and they expect it to feel effortless, intuitive, and personalized at every step. According to our research, more than half of travelers expect brands to anticipate their needs based on past interactions, and a majority are willing to share personal data in exchange for a more seamless and tailored experience.

These rising expectations do not come out of nowhere. Consumers have been conditioned by the digital ease of e-commerce, social media, and streaming platforms. Research shows that behaviors once limited to purchasing fast-moving goods (think: personalized recommendations from Amazon or instant access to movies or music) are now extending into more complex transactions like travel. This is especially true among younger generations that are living their lives online, and it's raising the bar for travel brands across the board.

It is not enough to offer great deals or beautiful destinations. Travel providers must understand the emotional, generational, and digital context that shapes decisions. Our report takes a closer look at these dynamics, uncovering not just what travelers are doing, but why.

The takeaway? The future of travel is social-first, value-conscious, and experience-driven. A few highlights:

- **Funding travel:** 63% of travelers say they make lifestyle adjustments to afford trips, cutting back on dining out (35%), shopping (31%), and local leisure activities (24%)
- **Influencer effect:** 39% of all respondents said influencers significantly shape their travel decisions. Among Gen Z, that number jumps to 62%
- **Social media inspiration:** While 43% of all respondents draw travel inspiration from friends and family, social media is the top source for younger generations, including 52% of Gen Z and 46% of Millennials
- **Personalized experiences:** 57% of consumers expect travel companies to anticipate their needs based on past interactions. And 55% are willing to share more personal data if it results in a smoother, more personalized experience

Together, these insights point to a new era of travel. Emotional motivations and digital expectations now go hand in hand. The brands that succeed will be those that meet travelers where they are, anticipate where they are going, and personalize every step of the journey.

Kenneth Purcell
Founder and CEO of iSeatz

SECTION 1:

ECONOMIC TRADEOFFS AND TRAVEL VALUE

53%

of Americans plan to take leisure vacations

Despite lingering inflation, interest rates, and uncertainty in 2025, travel demand in the U.S. remains resilient. However, consumers are making more strategic choices.

The good news: More than 53% of Americans plan to take leisure vacations this summer, up from 48% in 2024. Plus, travel prices, including airfare and lodging, have decreased through mid-2025, easing consumer pressure as overall inflation remains high.

But for many, that temporary relief isn't enough. Household debt and economic volatility still shape spending decisions. As a result, trip budgets have fallen sharply from 21% projected year-over-year increases to just 13% this year.

Still, rather than forego travel entirely, people are reworking their budgets and planning to travel more frugally. A Wells Fargo–backed study found that more than 75% of Americans report cutting back on non-essential spending, including travel, because of inflation. Yet instead of skipping their vacations, they are opting for shorter trips, regional destinations, and, according to our research, reallocating funds away from extras like shopping or entertainment to preserve the possibility of travel.

Taken together, these trends point to one simple truth: consumers are making economic tradeoffs to preserve travel in their lives. They may be spending less overall, but the intention and desire to explore remain intact.

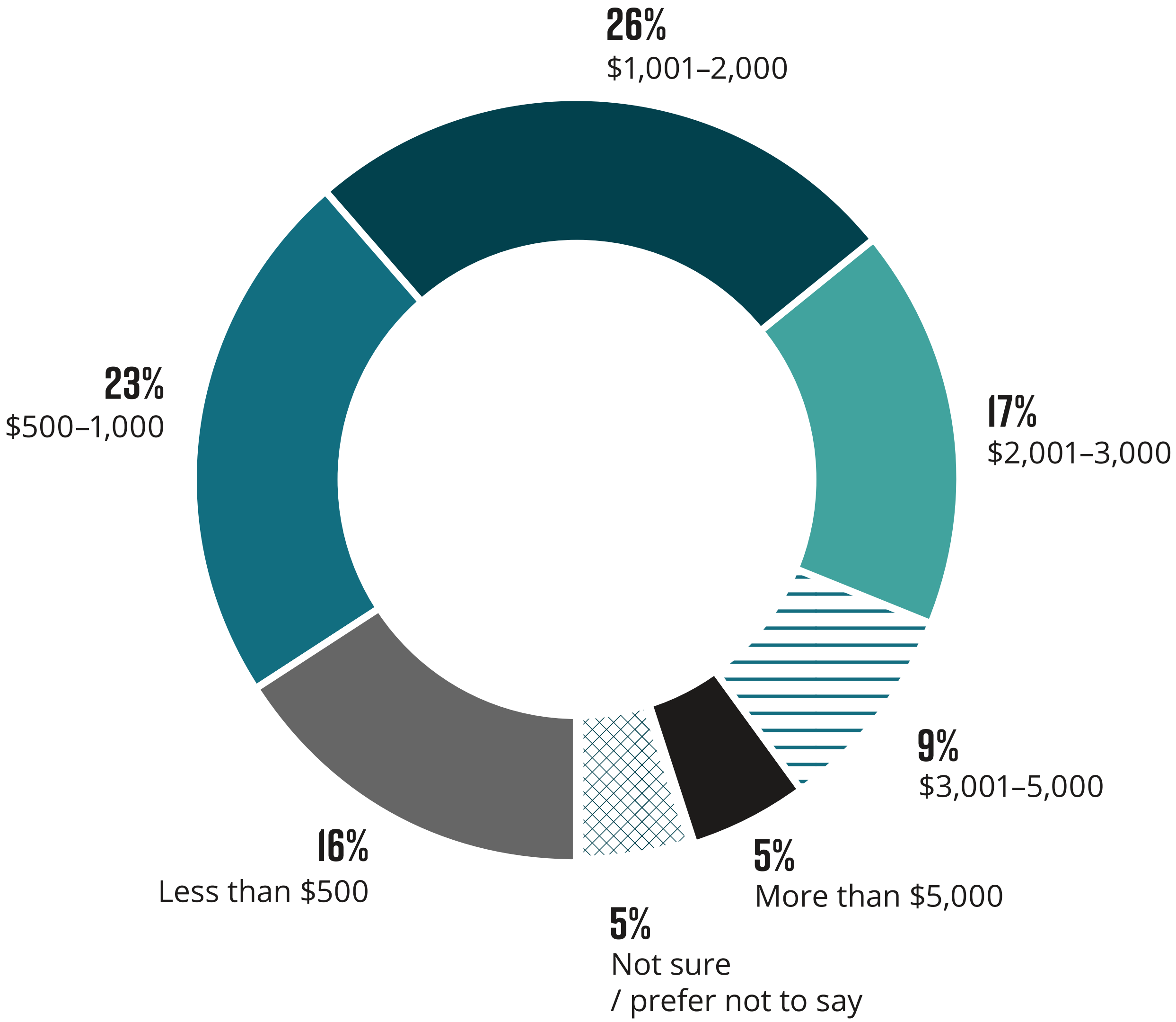
For travel brands, that means delivering clear and compelling value at every touchpoint. Keep in mind: Value is not just about price. It's about quality, personalization, and emotional return. Those who deliver will capture the modern traveler's heart and loyalty.

$1,899

MILLENNIALS SPEND THE MOST ON TRAVEL

The average American has $1,745 set aside for leisure travel in 2025, signaling a continued commitment to exploration, even in a cost-conscious climate. That number jumps to $1,899 for millennials, who remain the most travel-committed cohort.

WHAT IS YOUR TYPICAL BUDGET RANGE FOR A LEISURE TRIP?
(PER PERSON, EXCLUDING BUSINESS TRAVEL)



TRAVELERS SACRIFICE DAILY LUXURIES TO FUND WANDERLUST

WHEN YOU'RE LOOKING TO FREE UP FUNDS FOR TRAVEL, WHICH OF THESE SPENDING CATEGORIES DO YOU TYPICALLY PRIORITIZE CUTTING BACK ON?

#1

35%
Dining out

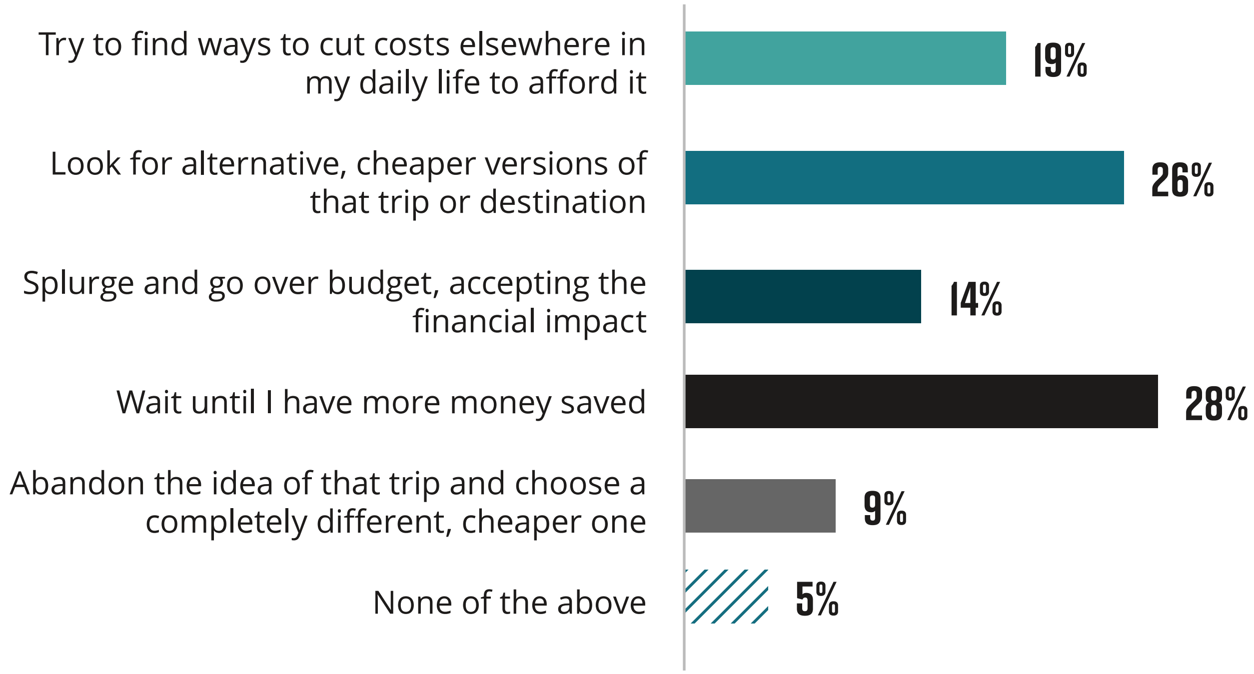
31%
Shopping

24%
Local / non-travel experiences

Of late, trips don't happen without tradeoffs. A full 63% of travelers report adjusting other areas of their life to afford travel, cutting back on dining out (35%), shopping (31%), and even local leisure activities (24%).

When asked how they'd handle a dream trip that exceeds their budget, travelers reveal pragmatic tendencies: 28% would wait and save, while 26% would seek a more affordable version of the experience. But less than 10% abandon the idea entirely.

IMAGINE YOU'VE FOUND THE PERFECT TRIP, BUT IT'S OVER YOUR BUDGET. WHICH OF THE FOLLOWING WOULD YOU BE MOST LIKELY TO DO?



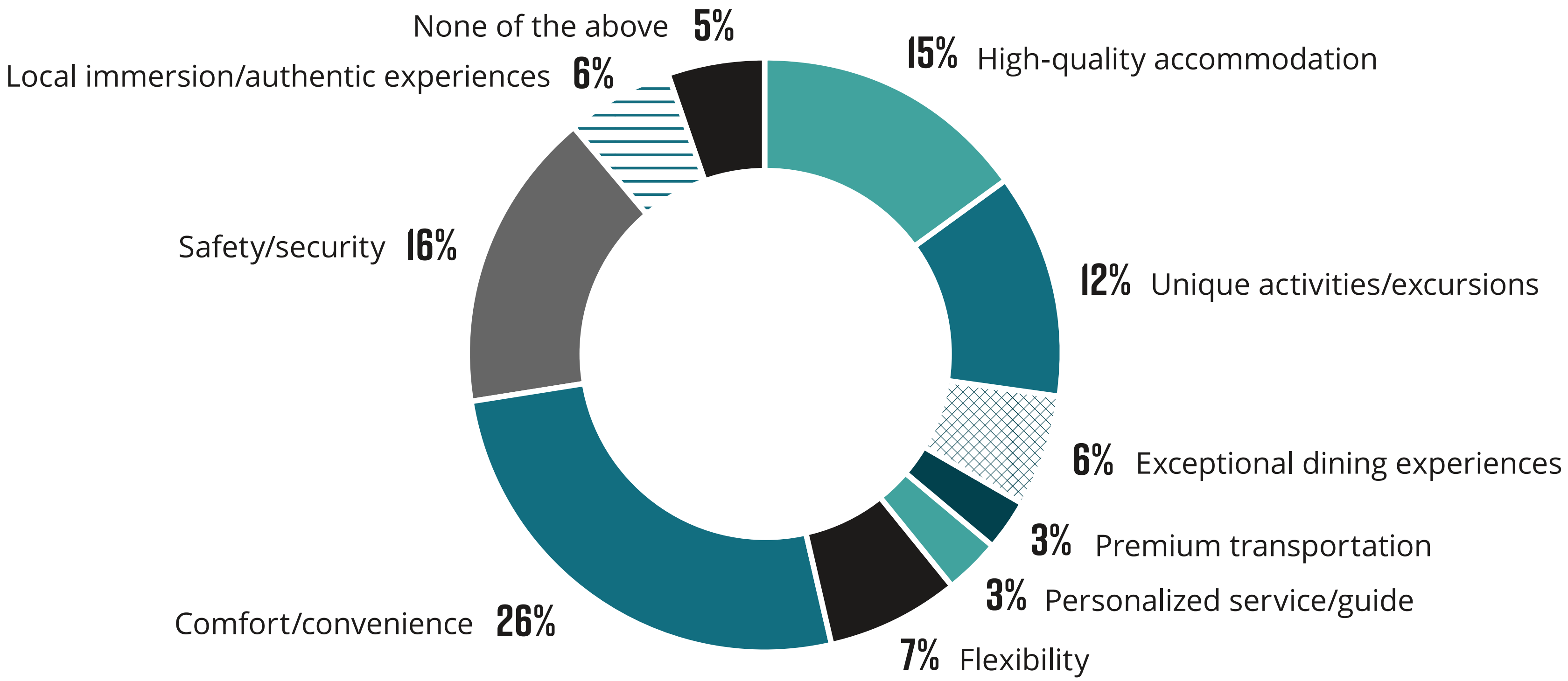
PRICE ISN'T EVERYTHING

Many are willing to pay a premium for what really matters—comfort and convenience (26%), safety (16%), and quality accommodations (15%)—suggesting that while travelers are watching their budgets, they are not just looking for the cheapest option.

They are prioritizing investments that enhance their overall experience, reduce stress, and deliver a sense of confidence and ease. In other words, today's travelers are values-driven in the truest sense: spending more when they see a clear, personal payoff.

The implication for travel brands? It's not just about offering cheaper options, but smarter ones like flexible booking policies, bundled perks that simplify decision-making, reliable transportation add-ons, or tech-enabled services that streamline check-ins and itinerary changes. These are the kinds of features that directly address what travelers care about and make the entire journey feel worth the spend.

ON WHICH OF THE FOLLOWING WOULD YOU MOST WILLINGLY SPEND MORE MONEY TO ENSURE A "GOOD TRIP" EXPERIENCE?



THE SAFETY PREMIUM

In today's unpredictable global climate, safety is becoming a bigger part of travel planning. We know that across all age groups, 16% of travelers say they're most willing to spend more to ensure safety and security, putting it ahead of premium transportation and even personalized services.

This trend is especially pronounced among millennials (19%) and Gen Z (18%). Given their always-online habits, they may be more attuned to global instability and are therefore more likely to factor it into their planning and purchase decisions. This shift signals the importance of clear communication around safety measures, destination stability, and emergency support services.

SECTION 2:

THE EXPERIENCE ECONOMY: WHAT MAKES A "GOOD TRIP"

As traveler expectations continue to evolve, today's consumers are looking for trips that feel personally rewarding. They're seeking experiences that offer not just value, but comfort, reliability, and a sense of emotional fulfillment.

This reflects a broader shift toward the experience economy, a familiar term that in travel simply means consumers are in search of more than just hotel rooms to sleep in. They want moments that feel seamless, stress-free, and share-worthy, where everything from booking to arrival contributes to a feeling of enjoyment and fulfillment.

Trust has also taken on new importance. It's no longer just about brand recognition but also confidence in the entire journey: that prices will be transparent, that support will be available when something goes wrong, and that what's promised will be delivered. Trust is built through consistency, responsiveness, and a clear understanding of what travelers value.

WHAT MATTERS MOST WHEN BOOKING A TRIP

When asked what matters most when booking a trip, value for money leads (26%), followed by relaxation/wellness (12%) and safety (12%)—a trio that reflects both financial concerns and a desire for restorative experiences.

WHEN YOU PLAN A TRIP, WHAT PRIMARY FEELING OR OUTCOME ARE YOU HOPING TO ACHIEVE?

26%
Value for money

12%
Relaxation / wellness

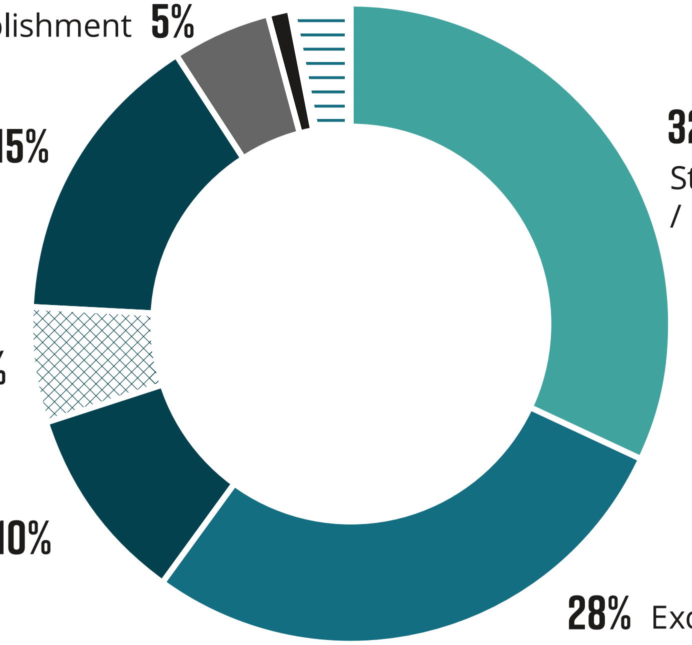
12%
Safety

TRAVEL'S TRUE PURPOSE BEYOND DESTINATIONS

The emotional goals align with consumers' reasons for booking: 32% of travelers want stress relief, 28% seek excitement, and 15% crave adventure. These aren't surface-level preferences; they speak to how people are using travel to reset, recharge, and reconnect.

And they're willing to pay extra for it—especially for comfort, safety, and quality accommodations, which signal to travelers that their well-being is prioritized.

WHEN YOU PLAN A TRIP, WHAT PRIMARY FEELING OR OUTCOME ARE YOU HOPING TO ACHIEVE?



ON WHICH OF THE FOLLOWING WOULD YOU MOST WILLINGLY SPEND MORE MONEY TO ENSURE A "GOOD TRIP" EXPERIENCE?

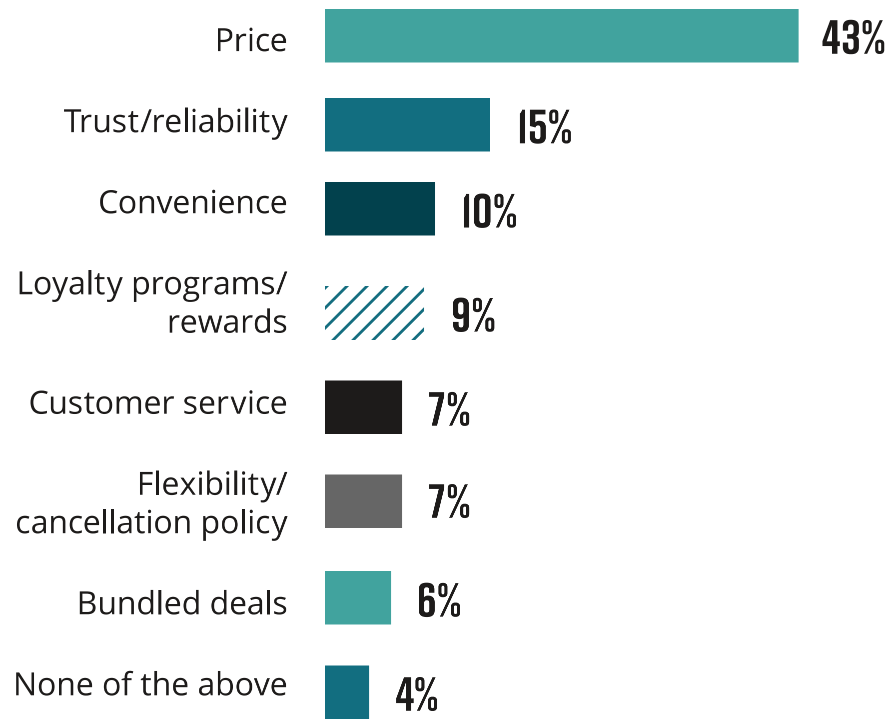
26% Comfort / convenience	16% Safety / security	15% High-quality accommodation	12% Unique activities / excursions
7% Flexibility	6% Exceptional dining experiences	6% Local immersion / authentic experiences	5% None of the above
3% Premium transportation	1% Other		

TRUST AND RELIABILITY REIGN SUPREME

Importantly, trust and reliability (15%) are now more influential in decision-making than even convenience or loyalty programs, particularly when it comes to how travelers book.

This signals a shift: travelers are shopping for confidence. Brands that deliver consistent, transparent, and high-quality experiences have a distinct edge.

WHICH OF THE FOLLOWING FACTORS INFLUENCE YOUR CHOICE OF BOOKING CHANNEL THE MOST?



SPOTLIGHT ON SUSTAINABILITY

Sustainability is emerging as a key consideration in decision-making. Many consumers express a strong desire to travel responsibly, and this mindset is gaining traction across generations. However, there is still a noticeable gap between intention and behavior.

GEN Z LEADS THE WAY ON SUSTAINABLE TRAVEL

56% of all travelers say they consider sustainable practices when planning trips, and 28% say it's central to every trip they take. Gen Z leads the charge, with 47% identifying as eco-centric travelers.

THE HURDLES TO SUSTAINABLE TRAVEL

However, conversion on sustainable travel is still hampered by familiar challenges. The top barriers? High costs (29%) and lack of transparency (15%).

INTEGRATING SUSTAINABILITY INTO THE CORE TRAVEL EXPERIENCE

Even so, nearly half of travelers (45%) say a travel provider's sustainability reputation influences their booking decisions, and 44% would pay a premium for certified eco-friendly options—especially millennials (64%).

Information about sustainable travel must be transparent, accessible, and embedded throughout the booking journey—not just positioned as an add-on.

SECTION 3:

GENERATIONAL LENSES ON THE TRAVEL JOURNEY

Generational context shapes behavior

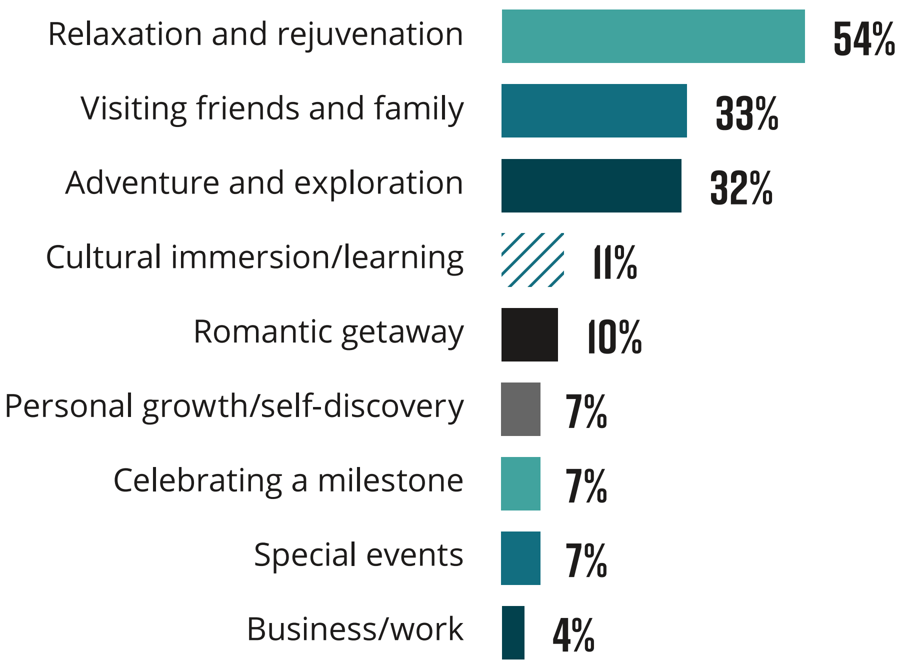
Understanding today's traveler means understanding the broader context of their lives—what stage they are in, what they care about, and how they make decisions. Travel is not a one-size-fits-all experience, and a closer look reveals just how much generational context shapes behavior.

From what inspires a trip, to how far in advance they plan, to how much they are willing or able to spend, each generation approaches travel with its own set of motivations, constraints, and expectations. These differences offer critical insights for brands looking to connect more meaningfully with their audiences.

AGE CAN SHAPE TRAVEL MOTIVATIONS

Most trips are still booked for vacation (73%), and most are taken with a partner (33%) or family with kids (27%). But a deeper look reveals distinct generational preferences.

WHAT IS YOUR PRIMARY MOTIVATION BEHIND BOOKING TRAVEL?



WITH WHOM DO YOU TYPICALLY TRAVEL?

33%	27%	21%	10%	7%
Partner/ Spouse	Family with children	Solo	Friends	Family without children

WHO'S TRAVELING AND WHAT THEY VALUE

A GENERATIONAL SNAPSHOT OF TODAY'S TRAVELERS

GEN Z: THE SOLO EXPLORER

- Most likely to travel alone (28%)
- Least likely to travel with a partner (23%) or children (20%)
- Prioritize adventure and exploration (43%) and seek excitement/joy (36%)
- Value spontaneity, inspiration, and low-friction, high-reward experiences
- Often influenced by social media and looking for unique, shareable moments

MILLENNIALS: THE WHOLE CREW

- Most likely to travel with children (46%)
- Split between traveling with a partner (21%) and friends (15%)
- Motivated by relaxation (53%), adventure (42%), and connection
- Look for family-friendly, stress-reducing solutions like all-inclusives or flexible itineraries
- Care deeply about personalization, convenience, and options that accommodate the whole group

GEN X: THE BALANCE SEEKER

- Split between traveling with a partner (35%) and family with children (28%)
- Strong focus on stress relief (40%) and relaxation (67%)
- Least likely to travel solo or with friends
- Seek stability and predictability, with focus on comfort, trust, and well-organized planning
- Prefer quality experiences with less friction over trendiness or novelty

BOOMERS + SILENT GENERATION: THE ONE-ON-ONE TRAVELERS

- Most likely to travel with a partner (47% Boomers, 48% Silent Gen)
- Very unlikely to travel with friends, children, or alone
- Motivated by peace, comfort, and cultural depth rather than adventure
- Strong preference for longer stays, slower travel, and high-quality accommodations
- Expect consistency, ease, and trusted brands

THE PACE OF PLANNING IS EVOLVING

Planning timelines also diverge: boomers average 12 weeks to plan and book a trip, while millennials and Gen Z take about 8 weeks, reflecting faster decision-making and perhaps a higher reliance on digital tools.

HOW FAR IN ADVANCE DO YOU TYPICALLY PLAN AND BOOK YOUR TRIPS?

AVERAGE

26%
1–2 months

21%
3–6 months

16%
3–4 weeks

14%
1–2 months

10%
It varies

9%
More than 6 months

5%
Less than a week

	1997-2007 Generation Z	1981-1996 Millennials	1965-1980 Generation X	1946-1964 Baby Boomers	1926-1945 Silent Generation
Less than a week	7%	5%	5%	4%	2%
1-2 weeks	18%	17%	15%	7%	15%
3-4 weeks	15%	19%	16%	13%	13%
1-2 months	28%	28%	26%	24%	18%
3-6 months	18%	15%	19%	29%	26%
More than 6 months	6%	6%	12%	10%	5%
It varies	8%	9%	7%	12%	21%

EMOTION VARIES BY GENERATION

Emotions play a central role in shaping travel decisions from the initial inspiration through booking and beyond. But the emotional outcomes travelers seek often vary by generation. Gen Z and millennials are most driven by excitement and joy, while older travelers tend to prioritize stress relief and a sense of peace when planning a trip.

Notably, while relaxation is the top motivator across all age groups (54%), 62% of Silent Gen travelers say their trips are primarily about visiting family, highlighting how life stage influences both purpose and destination.

The data shows that generational nuances matter: messaging, trip structures, and booking experiences should be shaped by the emotional and logistical realities of each generation. For example, Gen Z seeks adventure and self-discovery, making them a fit for flexible itineraries and bold, curiosity-driven messaging. Millennials, often traveling with kids, need stress-free, family-friendly options. Boomers, who value comfort and longer stays, are likely to respond to offerings that emphasize ease and depth of experience.

WHAT IS YOUR PRIMARY MOTIVATION BEHIND BOOKING TRAVEL?

54% Relaxation and rejuvenation

33% Visiting friends and family

32% Adventure and exploration

11% Cultural immersion / learning

10% Romantic getaway

7% Personal growth / self-discovery

7% Celebrating a milestone

7% Special events

4% Business / work

2% Other

SECTION 4:

DISCOVERY TO DECISION: A FRACTURED FUNNEL

The way travelers discover and decide has become increasingly fluid and multi-step. Instead of following a straight path from idea to booking, most travelers now move back and forth between inspiration, research, comparison, and planning across a variety of platforms.

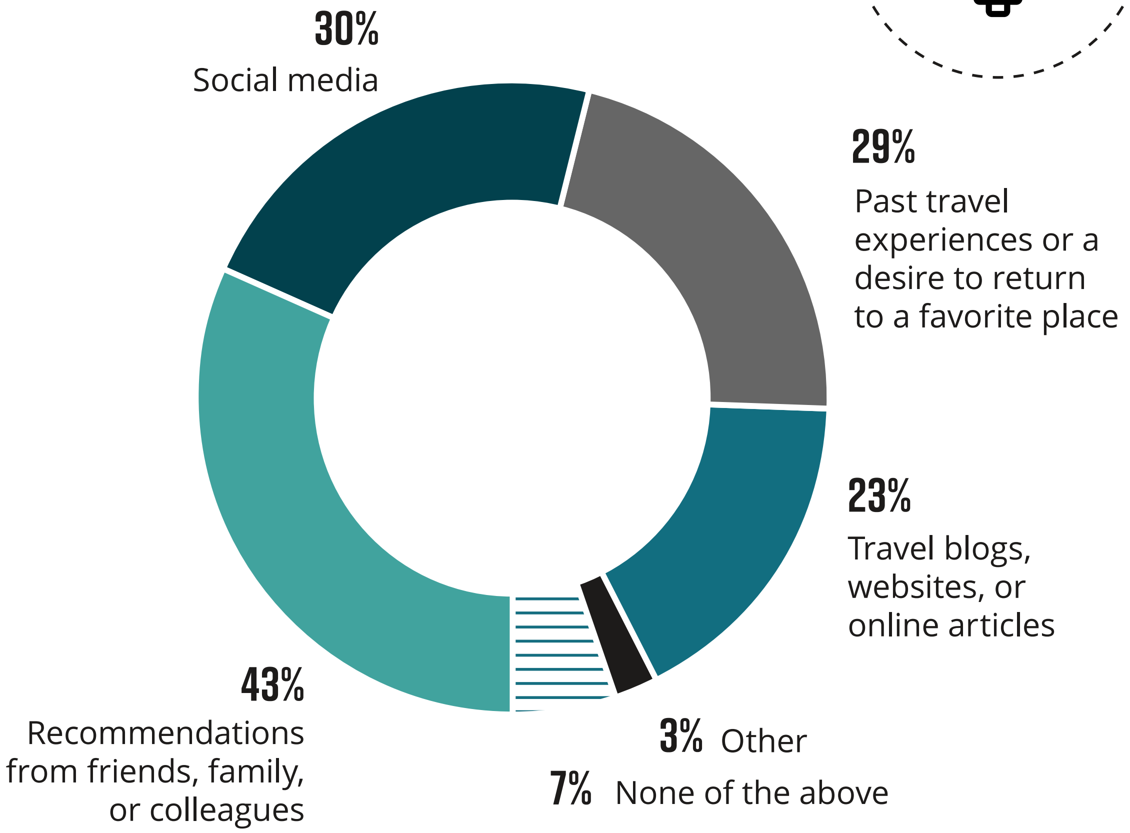
Social media plays a central role in this process, especially for younger generations who prefer visual, influencer-driven content to spark ideas. Older generations, on the other hand, continue to rely on friends and family for inspiration, placing more trust in personal recommendations.

Regardless of age, the journey from discovery to booking is still fragmented. Travelers often jump between social feeds, search engines, review sites, and booking engines, which creates both friction and opportunity. Travel brands that can bridge these gaps will be better positioned to capture interest and convert it into action.

A DIGITAL SHIFT IN TRAVEL INSPIRATION

43% say they're inspired by friends and family, but for younger generations, inspiration is digital first: 52% of Gen Z and 46% of millennials say social media is their primary source for travel ideas.

WHAT MOST OFTEN INSPIRES YOUR TRAVEL IDEAS?



	1997-2007 Generation Z	1981-1996 Millennials	1965-1980 Generation X	1946-1964 Baby Boomers	1926-1945 Silent Generation
Recommendations from friends, family, or colleagues	40%	43%	38%	47%	48%
Social media (e.g., Instagram, TikTok, Facebook, Pinterest)	52%	46%	27%	10%	2%
Past travel experiences or a desire to return to a favorite place	18%	24%	27%	39%	46%
Travel blogs, websites, or online articles	21%	27%	25%	19%	15%
Other	0%	1%	2%	6%	10%
None of the above	3%	4%	8%	11%	11%

GEN Z'S RESEARCH REVOLUTION

When it comes to research, the mix is even more fragmented. Social platforms (social media and YouTube, combined) lead (49%), but search (43%), word of mouth (35%), and OTAs (29%), all play major roles.

Gen Z stands out again—it's the only generation that prefers social media over search engines for researching trips (45%), reinforcing the need for creator-driven content and mobile-first formats.

WHICH PLATFORMS DO YOU TURN TO FIRST WHEN RESEARCHING A TRIP?

AVERAGE		1997-2007 Generation Z	1981-1996 Millennials	1965-1980 Generation X	1946-1964 Baby Boomers	1926-1945 Silent Generation
43%	Search Engines (e.g., Google, Bing)	37%	47%	38%	47%	38%
35%	Word of mouth from friends/family	24%	30%	30%	45%	56%
29%	Online Travel Agencies (OTAs) like Expedia, Booking.com, Kayak	26%	36%	31%	24%	21%
27%	Social Media	45%	40%	26%	10%	2%
23%	Airline or hotel brand websites/apps	22%	25%	20%	23%	34%
22%	YouTube/Travel Vlogs	31%	30%	24%	11%	8%
16%	Travel blogs/websites (e.g., Lonely Planet, Condé Nast Traveler)	14%	23%	16%	13%	8%
6%	None of the above	3%	3%	8%	9%	13%

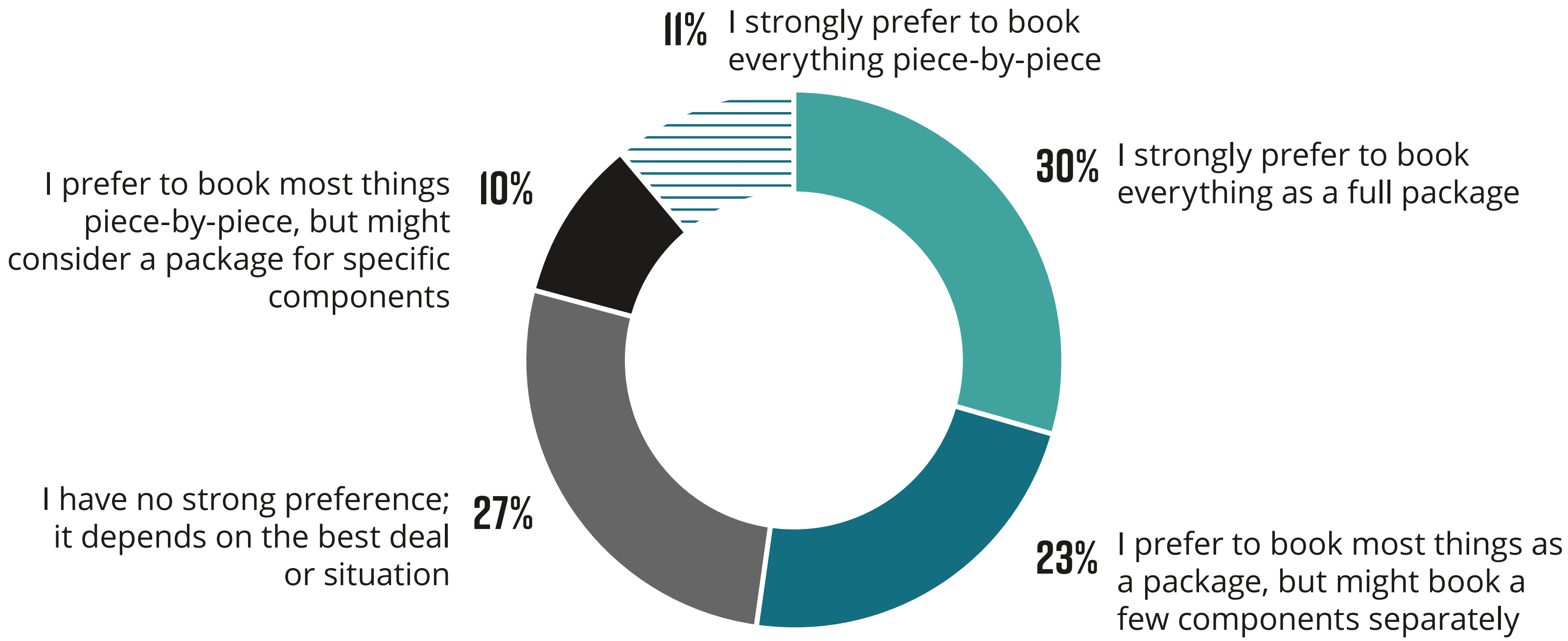
BOOKING PREFERENCES ACROSS GENERATIONS

Booking habits also reflect generational splits. 41% use OTAs, particularly younger travelers. In contrast, older generations—especially the Silent Generation (61%)—are more likely to book directly. Meanwhile, 53% of all travelers prefer packaged bookings, a number that rises to 63% for millennials, who value ease and perceived savings.

This behavior points to a persistent challenge: travel discovery and booking are still happening in silos. People are inspired on one platform, research on another, and complete the transaction somewhere else entirely. Each step is disconnected, creating unnecessary complexity and friction.

Bridging this gap is a major opportunity. Brands that create smoother transitions stand to capture more intent, reduce drop-off, and build stronger loyalty. That might mean surfacing real-time availability within social content, syncing saved ideas across devices, or designing booking flows that feel as effortless as the scroll that sparked the trip.

WHAT IS YOUR PRIMARY MOTIVATION BEHIND BOOKING TRAVEL?



SECTION 5:

SOCIAL COMMERCE AND INFLUENCER IMPACT

73%

of travelers say influencer recommendations led to booking decisions

Social media has evolved from a source of travel inspiration into a force that shapes where people go, how they plan, and increasingly how they book. A recent Skift study found that social platforms now outpace traditional media and travel agencies in inspiring trips, with 75% of leisure travelers saying that social media posts influenced their destination choices.

Influencers, creators, and peers are central to this influence. 73% of travelers say influencer recommendations led to booking decisions, with even higher impact among those under 40. In 2025, 66% of Gen Z and 51% of millennials rely on platforms like Instagram, TikTok, and Pinterest for travel inspiration.

TikTok, in particular, has become more than just entertainment. It is reshaping how travel content is consumed and converted. Lefty's Hospitality report shows TikTok's visibility in the travel space grew from near zero in early 2024 to 1% by Q1 2025. This is unsurprising given that 64% of social media users globally made a purchase within the platform in the past year, and 62% of global social commerce revenue in 2025 is attributed to Gen Z and Millennials.

Leveraging these trends requires brands to use real-time behaviors within social environments to their advantage: making content shoppable, aligning discovery and booking, and activating micro-influencers. For example, companies like TrovaTrip and Plotpackers offer influencer-led group trips, allowing fans to book travel packages directly tied to creators they follow. These influencer trips transform inspiration into action in one organic, community-driven experience.

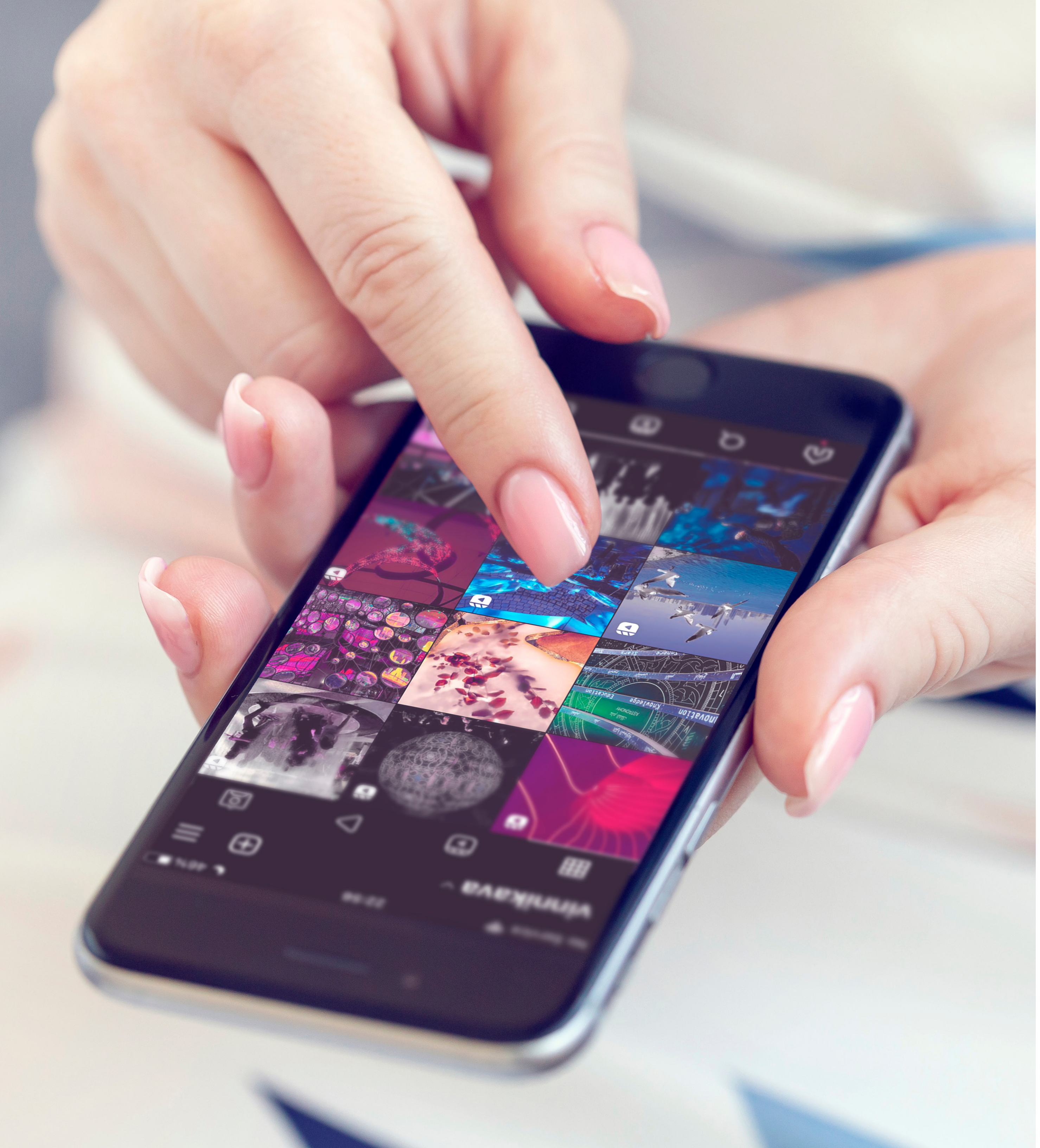
THE POWER OF INFLUENCE

Nearly 4 in 10 travelers (39%) say social media influencers have a significant impact on where they go and how they book.

That influence is even stronger among Gen Z (62%). Rather than replacing travel agents, influencers are emerging as trusted guides for inspiration and curation, especially among younger travelers. From highlighting destinations to sharing personalized itineraries and direct booking links, creators increasingly play a hands-on role in shaping travel choices and shortening the path to purchase.

TO WHAT EXTENT DO SOCIAL MEDIA INFLUENCERS OR TRAVEL CONTENT CREATORS SHAPE YOUR TRAVEL DECISIONS? (E.G., CHOOSING A DESTINATION, ACTIVITY, OR HOTEL)

AVERAGE		1997-2007 Generation Z	1981-1996 Millennials	1965-1980 Generation X	1946-1964 Baby Boomers	1926-1945 Silent Generation
16%	**Extremely** – I heavily rely on their recommendations and content to plan and book my trips; they are a major influence	21%	26%	16%	5%	2%
23%	**Significantly** – I often get inspiration for destinations or specific things to do, and it sometimes leads to booking decisions	41%	33%	22%	9%	0%
22%	**Moderately** – their content sometimes gives me ideas or makes me consider a place/activity, but it's not a primary driver	22%	23%	23%	21%	23%
39%	**Not at all** – I don't follow them, or their content doesn't affect my choices	16%	18%	40%	65%	75%



THE UNTAPPED POTENTIAL OF SOCIAL COMMERCE

Despite the growing impact of influencers, there isn't currently enough technical infrastructure to support discovery-to-booking experiences within social platforms.

That's a missed opportunity: 53% of millennials and 52% of Gen Z say they'd book travel directly from social media if it were secure and seamless, including.

HOW LIKELY OR UNLIKELY WOULD YOU BE TO BOOK TRAVEL DIRECTLY FROM SOCIAL MEDIA (INSTAGRAM, TIKTOK, PINTEREST, ETC.) IF IT WERE SECURE AND EASY?

34% Very unlikely

21% Somewhat likely

18% Neither likely nor unlikely

14% Somewhat unlikely

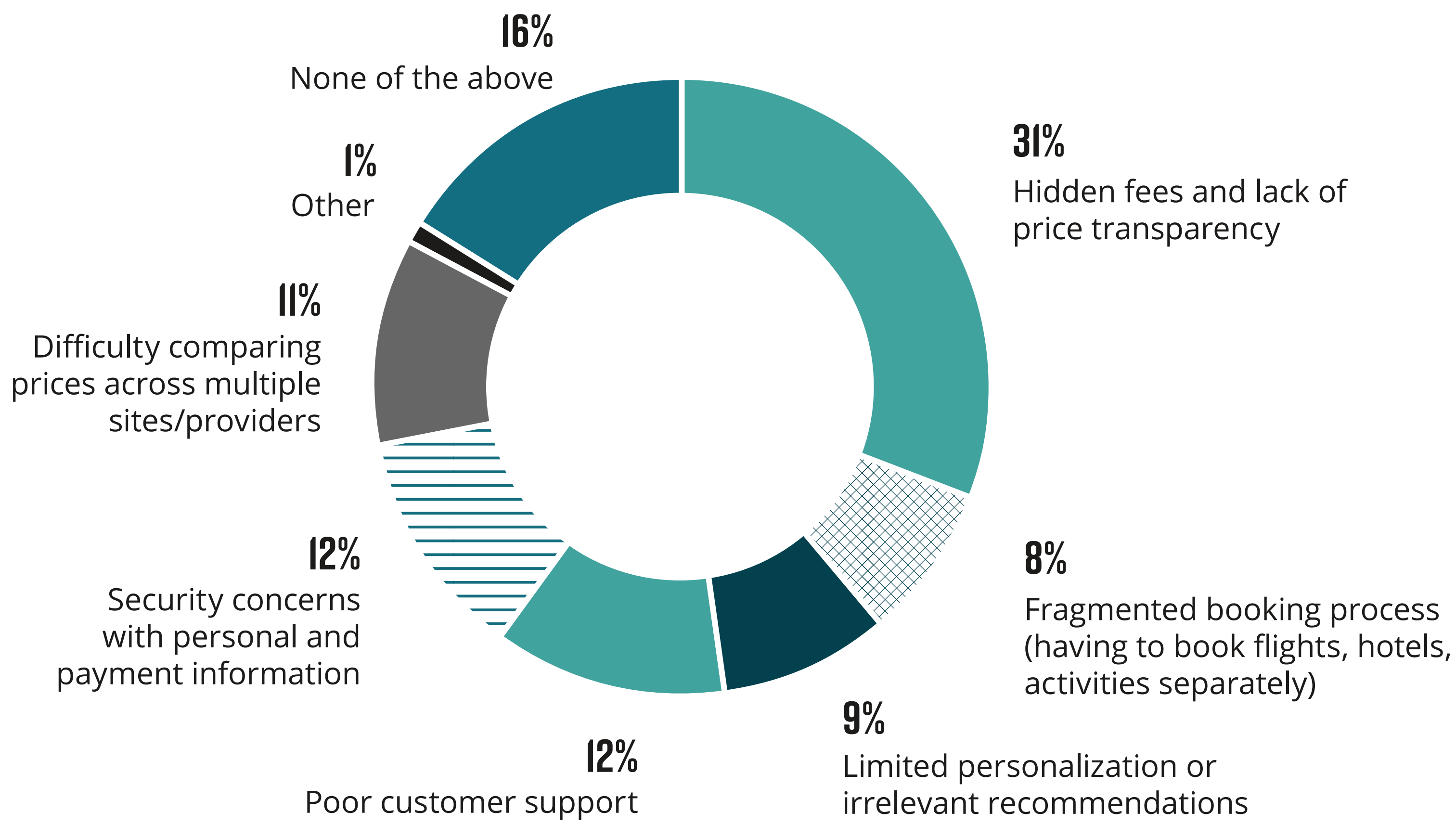
13% Very likely

OVERCOMING TRAVEL BOOKING FRUSTRATIONS

But to unlock this potential, brands must first address common pain points. Hidden fees (31%), poor customer service (12%), and security concerns (12%) top the list of frustrations.

The message is clear: if you want travelers to convert on new platforms, the experience must be trustworthy, frictionless, and transparent.

WHAT FRUSTRATES YOU MOST ABOUT CURRENT TRAVEL BOOKING TOOLS?



SECTION 6:

TECHNOLOGY, TRUST, AND THE PERSONALIZATION IMPERATIVE

71%

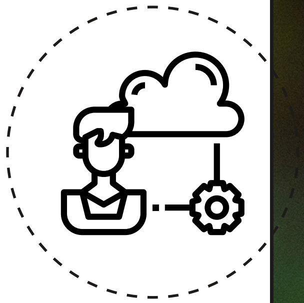
of consumers expect companies to deliver personalized interactions

Technology has transformed how people plan and book travel, but expectations are rising even faster than adoption. Many digital booking platforms still fall short, lacking the clarity, responsiveness, and consistency travelers expect.

What today's travelers want is confidence in the process. They want to know that what they book will match what's delivered. That prices are clear. That support will be there if something goes wrong. Meeting these expectations is what builds lasting loyalty.

Personalization is key to delivering that confidence. 71% of consumers expect companies to deliver personalized interactions, and more than 75% become frustrated if those expectations are unmet. This is where AI is playing an increasingly important role. From itinerary suggestions to smart booking assistants, AI helps travel brands personalize at scale using real-time insights to surface the right options at the right moment. Instead of just reacting to past behavior, AI enables brands to predict and guide, making planning faster, easier, and more aligned with what travelers actually want.

73% of travelers say they would be more likely to book with a travel provider that uses AI to offer personalized recommendations. That level of demand makes AI-driven personalization a competitive necessity.



AI ADOPTION CONTINUES TO GROW

While just 21% of travelers say they regularly use AI tools like chatbots or generative assistants for trip planning, there's significant generational variation. More than one-third of Gen Z (35%) and millennials (34%) already use AI regularly, compared to just 4% of baby boomers and 2% of the Silent Generation.

Another 25% of travelers overall say they haven't used AI yet but are interested, indicating growing openness, especially among younger generations. This signals a clear opportunity for travel brands to expand AI-powered offerings and meet rising expectations for intelligent, intuitive planning tools.

HAVE YOU EVER USED AI-POWERED TOOLS (E.G., CHATBOTS, GENERATIVE AI LIKE CHATGPT/GOOGLE GEMINI) FOR TRAVEL PLANNING OR RESEARCH?

37%	25%	21%	18%
No, and I'm not interested	No, but I'm interested	Yes, regularly	Once or twice

TRAVELERS EXPECT PERSONALIZATION

As AI-based trip planning tools mature, they'll need to meet high expectations: 57% of travelers already expect brands to anticipate their preferences and needs based on past behavior.

Millennials, in particular, are driving this shift. 74% say personalization is a baseline expectation, not a bonus.

DO YOU EXPECT TRAVEL COMPANIES TO KNOW YOUR PREFERENCES AND ANTICIPATE YOUR NEEDS BASED ON YOUR PAST INTERACTIONS WITH THEM?

AVERAGE		1997-2007 Generation Z	1981-1996 Millennials	1965-1980 Generation X	1946-1964 Baby Boomers	1926-1945 Silent Generation
20%	Yes, absolutely	28%	30%	22%	6%	7%
37%	Yes, to some extent	43%	44%	33%	31%	26%
33%	No, I don't expect that	21%	20%	32%	49%	59%
10%	Not sure	8%	5%	13%	13%	8%

TRAVELERS ARE WILLING TO TRADE DATA FOR TAILORED EXPERIENCES

Many consumers are willing to share more data to get what they want—especially millennials (68%)—a trend that mirrors behavior in industries like retail and hospitality, but is particularly strong in travel, where personalization and seamless planning are highly valued.

This data unlocks a clear opportunity for travel brands and platforms: deliver seamless, hyper-personalized planning and booking journeys, and you'll earn not just transactions but long-term loyalty.

HOW LIKELY OR UNLIKELY WOULD YOU BE TO SHARE MORE PERSONAL DATA (E.G., SPECIFIC INTERESTS, DIETARY RESTRICTIONS, PREFERRED ACTIVITIES) WITH A TRAVEL COMPANY IF IT LEADS TO A SIGNIFICANTLY MORE PERSONALIZED AND SEAMLESS TRAVEL EXPERIENCE?

AVERAGE		1997-2007 Generation Z	1981-1996 Millennials	1965-1980 Generation X	1946-1964 Baby Boomers	1926-1945 Silent Generation
22%	Very likely	26%	34%	22%	9%	15%
33%	Somewhat likely	36%	34%	33%	32%	26%
26%	Neither likely nor unlikely	27%	20%	25%	31%	26%
8%	Somewhat unlikely	5%	8%	7%	10%	16%
11%	Very unlikely	6%	4%	13%	19%	16%

Today's travelers—especially younger generations—are redefining the travel journey. They rely on social platforms not just for inspiration, but for planning and booking, and they prioritize experiences that offer emotional payoff, real value, and a sense of connection. Personalization, trust, and seamless technology are not nice-to-haves. They are baseline expectations. Travelers are increasingly willing to spend more for comfort, safety, and high-quality experiences, and many are open to sharing personal data when it leads to a more tailored and frictionless journey.

To keep pace, travel brands must do more than react to trends. They must actively shape the traveler experience by:

- Integrating social platforms and creators into every stage of the customer journey, from discovery to conversion
- Delivering clear, financial value that resonates with budget-conscious but experience-driven consumers
- Using data and AI-powered tools to personalize interactions and anticipate traveler needs
- Earning and maintaining trust through transparent pricing, reliable service, and strong data protection
- Eliminating friction through intuitive, connected technology that simplifies every step of planning and booking

The travel companies that succeed in this new landscape will be the ones that understand their customers deeply and design every touchpoint around what today's travelers value most.

DEMOGRAPHICS & METHODOLOGY

This online survey of 1,000 Americans aged 18+ who travel, nationally represented, was commissioned by iSeatz and conducted by market research company Talker Research, in accordance with the Market Research Society's code of conduct. Data was collected from July 1 to July 9, 2025. The margin of error is ±3.1 points with 95% confidence. This survey was overseen by Talker Research, whose team members are members of the Market Research Society (MRS) and the European Society for Opinion and Marketing Research (ESOMAR).

ABOUT iSEATZ

iSeatz is a travel technology company that powers booking and personalization platforms for some of the world's most influential travel, hospitality, and financial brands, including American Express, IHG Hotels & Resorts, and Qantas. For 25 years, iSeatz has provided the infrastructure that connects millions of travelers to trips and experiences, integrating data from airlines, hotels, and activity providers to deliver seamless, reliable booking at scale. The company's platform supports a wide range of ancillary products, payments, and digital touchpoints, enabling partners to capture more value and deliver more relevant traveler experiences. With expertise in personalization, trip inspiration, and the emerging creator economy, iSeatz helps brands adapt to rising consumer expectations and define the next era of connected travel.