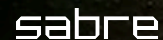
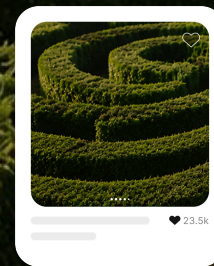


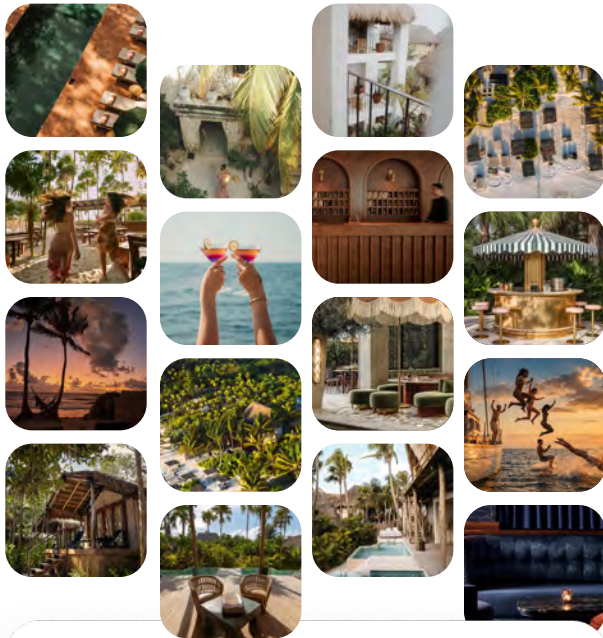
# AI Readiness Report

Closing the Gap Between Traveler  
and Industry Adoption of AI





# Introduction



Cabo for a friends' trip in mid-September. Eight of us. One big suite if it works, two connecting rooms if it's smarter. Rooftop pool, beachfront, close to nightlife.

 Ask AI

Ask a traveler how they planned their last trip, and the odds are better than a coin flip that AI was involved. **More than half already use it to plan trips, and three-quarters say they intend to for their next one.**

Ask a destination how its website handles AI, and the odds flip the other way. **Only about one in five have anything live on their site.**

That gap between what travelers already expect and what the industry can offer is what this study set out to measure. Conducted in April 2026, the study surveyed more than 1,000 U.S. leisure travelers and more than 100 U.S. destination marketing leaders and practitioners. The information presented below reflects the results of and conclusions drawn from the study.

The findings show travelers and destinations are at very different stages of AI adoption. Travelers have moved beyond experimenting with AI. They now turn to it for inspiration, use it to compare prices, build day-by-day itineraries, and increasingly trust it to play a role in booking. Destinations, by contrast, are still determining how AI fits into the traveler experience.

It's not that travel brands don't care about meeting travelers' evolving expectations. It's that many simply can't, at least not on their own. Tight budgets, small teams, and limited in-house technical expertise make building an AI-powered experience from scratch unrealistic.

The good news is that the gap doesn't have to widen. What follows is a data-driven look at where that gap appears across the traveler journey, how quickly traveler expectations are changing and where the industry has the greatest opportunity to respond, based on the study.

# The Adoption Surge

## Consumers Lead, Infrastructure Lags

The gap between what travelers already expect and what destinations can deliver didn't open because destinations stood still. The problem isn't effort. It's pace.

Most destinations are still in the Early Adopter phase. Nearly every Destination Marketing Organization (DMO) has experimented with AI, whether piloting a chatbot, testing translation tools or generating content. But they're still determining which capabilities deserve investment and how AI should fit into the traveler experience.

Meanwhile, travelers have moved well beyond Early Adopter and are approaching the Late Majority, making AI a regular part of how they discover, plan and increasingly book trips.

|                                                                                                              | Innovators               | Early Adopters                  | Early Majority                | Late Majority                    | Laggard                                |
|--------------------------------------------------------------------------------------------------------------|--------------------------|---------------------------------|-------------------------------|----------------------------------|----------------------------------------|
|                                                                                                              | First to test what's new | Spot potential before others do | Move once the value is proven | Wait until adoption is necessary | Adopt only when alternatives disappear |
|  <b>Traveler Position</b> | ✓ Passed                 | ✓ Active                        | ✓ Entered                     | → Approaching                    | ✗ Not yet                              |
|  <b>DMO Position</b>      | ✓ Passed                 | ⚠ Partial                       | Lagging                       | ✗ Not yet                        | ✗ Not yet                              |



Viewed through the lens of technology adoption, **the industry is operating roughly one-and-a-half adoption phases, or about two years, behind the travelers it hopes to serve.** That shift has outpaced the industry's ability to adapt, and it isn't slowing down to let anyone catch up.



**54%** of travelers use AI to plan a trip

vs.

**22%** of DMOs offer an AI trip planner

The numbers reinforce that shift. **Fifty-four percent** of travelers have already used AI to plan a trip, **75% intend to use it again**, and **63% would use an AI trip planner** directly on a destination's website if one existed. Yet **only 22%** of DMOs currently offer one.

Travelers are already voting with their clicks. **Twenty-five percent** say they'd bypass a destination's website altogether if it doesn't offer AI features.



DMO leaders feel that pressure themselves. **Seventy-two percent** agree that failing to adopt AI within the next two years risks real irrelevance in how travelers discover and choose a destination.

Yet only **26%** of DMOs have a documented AI strategy built into their marketing plan. The rest are experimenting, but without a strategy to turn scattered pilots into lasting capability. **Forty-seven percent** point to staff bandwidth as the primary obstacle, followed by technical expertise (**37%**) and budget (**35%**).

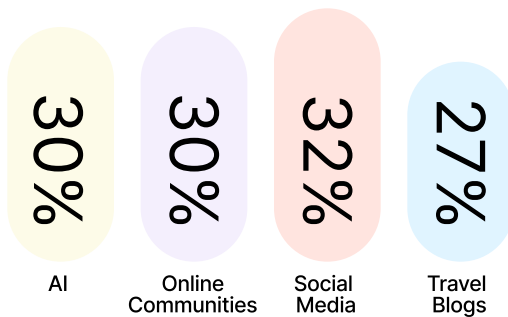


# The Authority Shift

## AI as the New Gatekeeper of Discovery

Before travelers start planning, they need inspiration first: an idea, a spark, a feeling that pulls them toward one place over another. For a while, that came from a handful of familiar sources, including social media (a friend's summer vacation photos, a favorite influencer's reel). Now, AI has joined that list.

### Where Travelers Look for Trip Ideas



**Thirty percent** of travelers say they turn to AI when they're looking for ideas on where to go, putting AI even with online communities (**30%**), just behind social media (**32%**), and ahead of travel blogs (**27%**).

**Forty percent** say AI has introduced them to a destination they wouldn't have found on their own. **Twenty-nine percent** changed their destination because of an AI recommendation. That's more than an idea. It's a decision.

Destination leaders see this shift, too. AI isn't just becoming another place travelers find ideas. It's increasingly becoming the gatekeeper that decides which destinations get considered in the first place. Half believe AI is redirecting travelers to different destinations right now, a clear-eyed acknowledgment of the stakes.

### How AI Is Influencing Travel Decisions

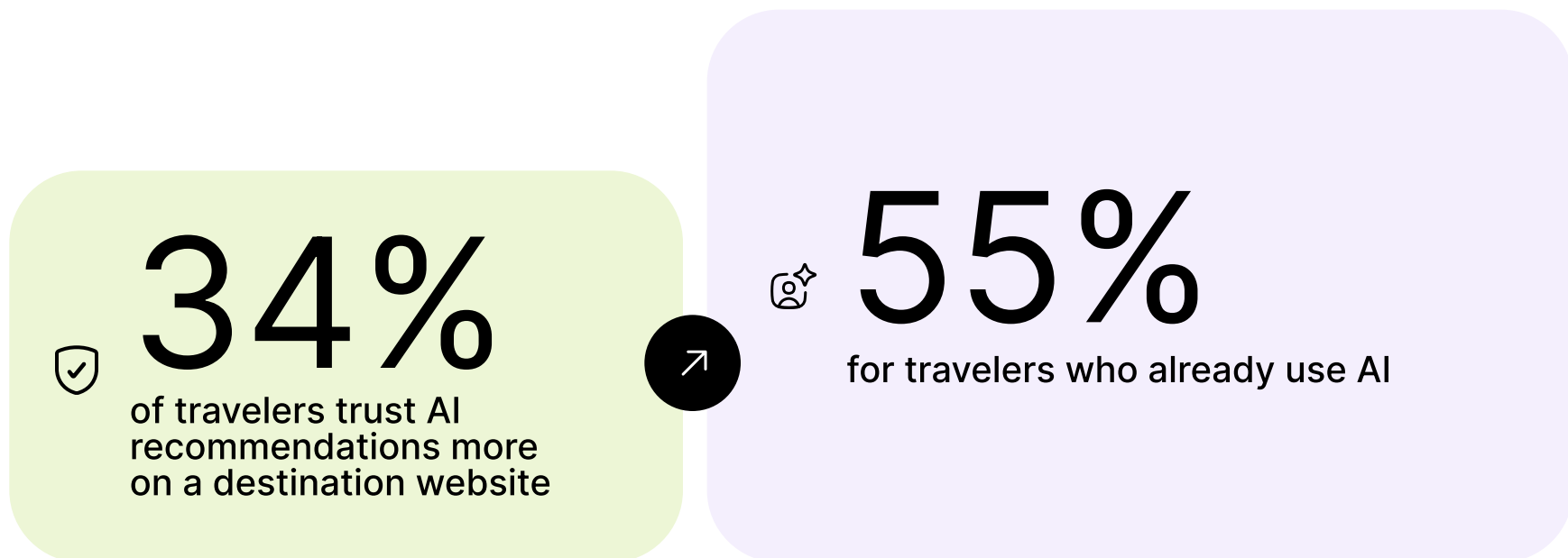
 **40%**  
of travelers discover destination ideas

 **29%**  
of travelers change destination choice

 **50%**  
of DMOs believe AI is redirecting travelers to different destinations

When AI shapes discovery, it also shapes whether travelers ever reach a destination's website. The effects are already showing up. **Seventy percent** of DMOs report declines in organic search traffic they attribute to AI-powered search results such as Google's AI Overviews.

Search optimization still matters. It just isn't enough anymore. Being findable now depends on whether AI can find a destination's information, trust it, and recommend it. The industry has a name for this: answer engine optimization, or AEO.



That same emphasis on trustworthy content matters to travelers, too. **Thirty-four percent** say they trust AI recommendations on an official destination website more than they trust general-purpose tools. Among travelers who already use AI for travel planning, that number climbs to **55%**.

Destinations that make their content authoritative and accessible to AI systems aren't just protecting search visibility. They're becoming the source those systems point to, right at the moment a traveler is deciding where to go.

# The Functional Disconnect

## The Shift from Inspiration to Utility

Destination websites were built to inspire — beautiful photography, event calendars, attraction guides, the kind of storytelling that gets someone imagining their next trip. That's real, and it still matters. But inspiration is no longer the end of the journey. Once a traveler knows where they're headed, they're ready to switch into planning mode.

### How Travelers Are Using AI to Plan

**60%** research things to do

**56%** compare prices

**43%** build a plan

That's where AI shifts from inspiration to utility. **Sixty percent of travelers** use it to research attractions, restaurants, and things to do, **56%** to compare prices, and **43%** to build an actual day-by-day plan.



**31%**

of travelers find turning inspiration into an itinerary frustrating

**20%**

of DMOs see itinerary building as a worthwhile investment

Travelers are already using AI for these planning tasks, but rarely on destination websites. **Thirty-one percent** of travelers say turning inspiration into a concrete itinerary is one of their biggest frustrations. Yet only **20%** of DMO leaders consider it a high-value feature worth investing in, right when travelers need that help most.

Destinations that limit AI to inspiration are ceding the most valuable parts of the planning journey — research, comparison and itinerary building — to third-party platforms.

Closing that gap doesn't require destinations to overhaul everything at once. AI can already turn a traveler's interests, preferences and travel dates into a personalized itinerary directly on the destination's own site, keeping the planning experience where the inspiration began.



# The Next Frontier

## Agentic Booking

Once a traveler has picked a destination, built an itinerary and found prices they're comfortable with, one step remains: completing the booking. It's the next frontier in AI's role in the travel journey.

### Traveler Comfort Levels Using AI for Booking



38%

book fully  
through AI



37%

prefer AI-assisted  
research



42%

expect AI to  
play a bigger  
role in booking

**Thirty-eight percent** of travelers already say they're comfortable booking flights, hotels or experiences through AI. This rises to **46%** among Gen Z and **63%** among Millennials, the next generation of travel decision-makers.

Today, **37%** of travelers prefer AI-assisted research while making the final booking decision themselves, reflecting a trust curve that's still building. That confidence increases further when a human safety net exists. **Fifty-four percent** say they'd feel more comfortable booking through AI knowing a person was available if something went wrong.

While only **9%** of travelers want AI to fully handle a booking without them today, they're warming to the idea, with **42%** expecting AI to play a meaningful role in booking in the next 12 months.



For destinations, meeting those evolving expectations hasn't been easy. Offering direct booking today often means pulling rates from OTAs, putting destinations in competition with the same hotels and operators they exist to support.

#### DMO Direct Booking Challenges



**40%** of DMOs without booking see their role as inspiration

**25%** cite partner competition concerns

**19%** point to unreliable partner data

That complexity is reflected in both how destinations view their role and how they operate. **Forty percent** of DMOs without direct booking see their role as inspiration rather than transactions, while **25%** cite partner competition concerns and **19%** point to unreliable partner inventory data.

As a result, only

**16%**

offer direct booking, while



**57%**

route travelers to partner sites instead

**Agentic AI is poised to resolve that tension** by allowing destinations to support direct bookings while preserving relationships with their hotel and attraction partners.

The opportunity is to rethink where a destination's role ends. With agentic AI, destinations have the potential to remain part of the travel journey from discovery through booking.



# The Path Forward

## Actions for Industry Leaders

The gap between traveler AI adoption and industry readiness is real, and it won't close on its own. The path forward doesn't require reinventing the traveler experience. It requires meeting travelers where they already are. Here are the actions industry leaders can start taking today.

### ✓ **Close the strategy gap before it closes you.**

Develop a clear AI strategy. As AI reshapes how travelers discover, research and plan trips, organizations without a clear roadmap risk falling behind.

### ✓ **Stop building for inspiration alone. Start building for utility.**

Design experiences that help travelers accomplish what they came to do. The brands that win will answer questions, compare options, build itineraries and remove friction throughout the planning journey.

### ✓ **Own the planning experience.**

Bring AI trip planning directly to your website to engage travelers earlier in their decision-making journey and provide a trusted planning experience grounded in your destination's expertise.

### ✓ **Optimize for AI discovery.**

Create content that directly answers traveler questions and is structured so AI systems can understand, trust and recommend it. If AI can't find your content, travelers may never find you.

### ✓ **Prepare for an agentic future.**

Start planning for a world where AI helps travelers complete tasks, not just plan trips. As agentic booking matures, determine how trusted partners, local businesses and booking providers can work together to keep travelers connected to the destination ecosystem.

### ✓ **Prioritize speed over scale.**

Don't wait to build every AI capability from scratch. Focus on solutions that can be implemented quickly, integrate with your existing ecosystem, and evolve alongside traveler expectations.

The odds at the beginning of this report aren't fixed. Travelers have already embraced AI as part of the travel journey. The organizations that adapt now have an opportunity to close the gap, strengthen their role throughout the travel journey, and help shape what comes next.



# About This Study

This report is based on a study conducted in **April 2026** by MMGY Intelligence, in partnership with Sabre, Sojern and Mindtrip. The research surveyed **1,006 U.S. leisure travelers** and **103 U.S. destination marketers** representing local, regional, state and national tourism organizations. Among the destination marketers surveyed, 77% held executive or marketing roles.

The traveler sample included five generations, a broad range of household incomes and people planning both domestic and international travel. Ninety-six percent had taken an overnight trip within the previous 12 months. The traveler survey has a margin of error of  $\pm 3.1\%$  at the 95% confidence level.



MMGY Travel Intelligence is MMGY's data and insights division, offering proprietary research including Portrait of American Travelers™ as well as DK Shifflet's TRAVEL PERFORMANCE/Monitor™, which utilizes the largest continuous consumer travel database in the industry.

Travel Intelligence's services are designed to power travel industry decision-makers through consumer insights, travel performance data, and audience modeling and segmentation. To learn more about the extensive collection of research, analytics capabilities and strategy services, visit [mmgyintel.com](https://mmgyintel.com) or email [research@mmgyglobal.com](mailto:research@mmgyglobal.com).

## ✦ mindtrip.

Mindtrip is your personal travel assistant, one that knows you, works for you and keeps you one step ahead. Powered by agentic AI and travel-specific intelligence, Mindtrip learns what matters to you, remembers it from one trip to the next and helps you plan, book and navigate every stage of your journey with greater confidence.

Mindtrip also powers AI experiences on destination, hotel and travel brand websites, helping partners deliver more personalized traveler experiences. Founded in 2023 in Silicon Valley by serial entrepreneurs with a proven track record of bringing innovative technology products to market, Mindtrip was built on the belief that travel should start with you, not just where you're going. Learn more at [Mindtrip.ai](https://Mindtrip.ai).

## SOJERN

Sojern ([www.sojern.com](https://www.sojern.com)) is the leading AI-powered Traveler Platform, designed to boost growth and profitability for the travel industry. The Sojern Traveler Platform is a set of easy-to-use software and services that delivers unrivaled traveler insight, intelligent audiences, multichannel activation and optimization, and a connected guest experience — all in one place.

More than 13,000 travel marketers rely on the platform annually to find, attract, convert and engage travelers. Sojern, founded in 2007 and acquired by RateGain in 2025, is headquartered in San Francisco with teams in the Americas, Europe, Middle East, Africa and Asia Pacific.

## sabre

Sabre is an AI-native technology leader, backed by one of the world's largest travel data clouds. With AI at its core and operating at unparalleled scale, Sabre transforms insights into innovation, empowering airlines, hoteliers, agencies and other partners to retail, distribute and fulfill travel worldwide.

Sabre is built on an open, modular, cloud-native architecture and serves as the backbone for both established leaders and bold, new disruptors, guiding them to the next age of travel retailing through intelligent, connected, and personalized experiences.