



**FIVE TRENDS**

# Shaping the future of travel and hospitality

How AI and voice solutions are driving a new wave of guest experiences



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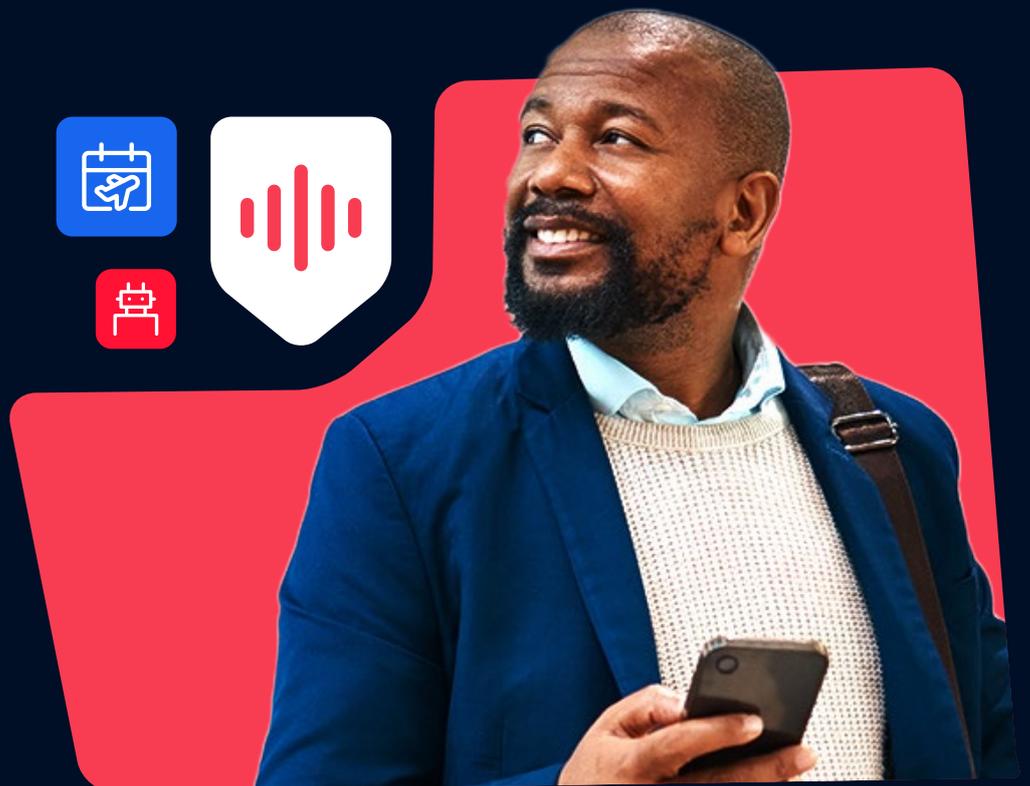
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## INTRODUCTION

The travel and hospitality landscape is evolving, with travellers today seeking experiences that are more intuitive, inclusive, and emotionally resonant. Technologies like voice and AI are stepping into the spotlight, not just as tools for convenience, but as catalysts for connection.

This report explores five key trends shaping the future of the industry: ***AI Genies, Serendipity Seekers, Rooted Roads, Right to Roam, and Signature Stays***. Together, they reveal how behavioural shifts and emerging technologies are redefining how people plan, book, explore, and engage with the world around them.

Each trend is paired with strategic opportunities to help brands respond with purpose. The message is clear: travellers want services that understand them, adapt in real time, and add value at every step. Voice, in particular, is becoming a vital interface, offering hands-free ease and natural interaction when it matters most.

Join us as we take a deep dive into how travel and hospitality brands can use voice solutions to keep up with shifting consumer expectations.



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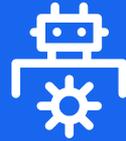


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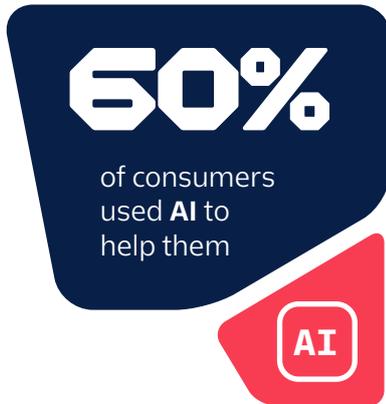
# AI GENIES

## // Travel, optimised

In the race for greater convenience, a new wave of generative AI-powered assistants is stepping into the spotlight. These **AI Genies** are set to transform the travel and hospitality industries by managing planning, booking, and real-time changes on the go. As travellers hand over more decision-making to technology, brands must adapt to a landscape where seamless integration and intelligent autonomy are key to staying ahead.



## DRIVERS

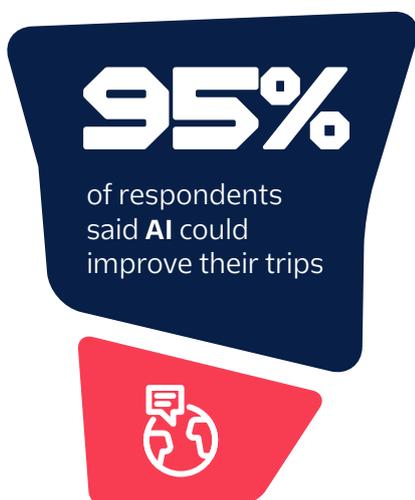


### Trusted intelligence

Nearly **60% of consumers say they've used AI to help them make purchase decisions**, according to a University of Virginia report. What's more, almost half of consumers now trust AI more than a friend when seeking advice. These behaviours reflect a growing comfort with AI as a decision-making partner – one that filters options, offers recommendations, and increasingly acts as the first point of contact between consumer interactions with brands.

### Glow up

By the end of 2024, there were approximately **8.4 billion digital voice assistants in use worldwide**, a figure that surpasses the global human population, driven by consumers using multiple devices. This number has doubled from **4.2 billion in 2020**, showing how consumers are building their routines around this technology. As AI assistants become more popular, brands must recognise voice technology not just as a feature, but as a foundational layer of customer experience.



### Smart trips, higher stakes

The use of technology in planning and experiencing trips is not slowing down. The **global Virtual Travel Assistants market reached USD 1.6 billion in 2024** and is projected to grow steadily through 2034. In fact, this growing reliance is only increasing travellers' expectations: in a recent American Express study, **95% of respondents said AI could improve their trips**, especially by making them more convenient (44%) and cost-efficient (43%).

## INNOVATIONS



### Airbnb expands AI customer service bot in the US

Airbnb is ramping up its use of AI in customer service. By May 2025, around 50% of US users were already interacting with Airbnb's AI-powered support bot, with the company expecting to complete a full rollout across the country by the end of that month. Launched in April 2025, the bot has helped reduce the need for human agent support by 15%, according to company figures. While rivals like Booking.com and Expedia focus on AI-driven travel planning, Airbnb is taking a more cautious approach, prioritising customer service before expanding AI into trip design or bookings.



### Travel agency integrates conversational voice technology into existing chatbot

As part of a public beta with OpenAI's Realtime API, the US-based travel agency Priceline enhanced its chatbot with voice capabilities, supporting hands-free hotel searches, real-time responses, and activity

recommendations in over 120 languages. Announced in October 2024, Penny Voice can process complex queries, anticipate user needs, and respond with appropriate emotional nuance using OpenAI's GPT-4o, Voice Engine, and Realtime API. Initially accessible on iOS, desktop, and mobile web interfaces, future updates aim to add flight, car hire, and holiday package bookings.



### Airline introduces AI-powered tool to streamline flight bookings

Booking a flight online can be a complex process, but Air India aims to make it easier. In February 2025, the airline launched eZ Booking, an AI-powered feature that lets users book flights using text or voice commands. Acting as a virtual travel agent, the tool understands user preferences and generates personalised itineraries. Initially available on the website for Maharaja Club loyalty members, eZ Booking will soon be rolled out to Air India's mobile site and app.



## OPPORTUNITIES



### Brand butlers

Busy, choice-laden and demanding consumers will appreciate (and reward) brands that go the extra mile and offer pre-emptive and helpful support services. Personalised virtual agents, equipped with historical data and customer profiles, can act as intelligent concierges and respond with context, empathy, and speed. The result? A seamless experience that feels personal and one step ahead.



### Talk over tap

As travellers increasingly rely on AI for decision-making, they expect faster, more intuitive ways to connect with brands. Voice provides instant access to answers, updates, and support, cutting through digital clutter. When plans change, travellers can respond on the go – with no typing or tapping required.



### Trusted curators

As AI overwhelms consumers with options, the opportunity arises for travel brands to position themselves as trusted curators. In an age of automation, relevance is the real differentiator – and it depends on data. When AI is powered by richer, real-time inputs, it can surface choices that feel less like generic suggestions and more like thoughtful recommendations from a brand that truly understands the traveller.



### Conversational companions

As AI assistants become more embedded in the travel journey, voice is emerging as a key interface for real-time, human-like interaction. Programmable voice technology enables brands to build conversational agents that don't just respond, but understand. These systems can process tone, urgency, and context to deliver support that feels intuitive and personal. Voice-first experiences are redefining what it means to have a digital concierge.

## TREND 2:

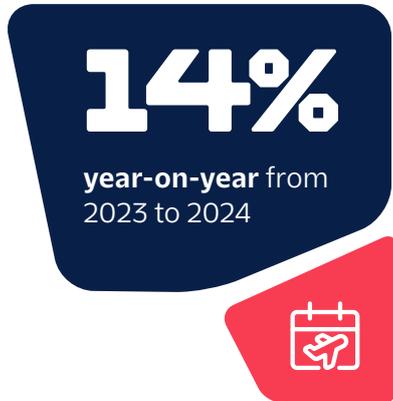
# SERENDIPITY SEEKERS

## // A return to surprise

The popularity of [mystery holidays](#), pop-up shops, and [Labubu blind boxes](#) shows that consumers are craving a certain amount of unpredictability. [80% of global consumers say a brand's ability to surprise and delight in unexpected ways](#) is key to winning their loyalty. Yet as algorithms get better at curating, some are pushing back and seeking spontaneity in an increasingly optimised world. Predictive capabilities deliver convenience, yes, but there's a cost: fewer surprises, fewer discoveries, and a sea of sameness. How will your brand engineer serendipity in an age of automation?



## DRIVERS



### The rise of last-minute travel planning

Lead times for bookings have dropped by **14% year-on-year from 2023 to 2024**, signalling a growing preference for impromptu travel – especially among Gen Z, with **20% booking flights less than a week in advance**. While the industry still focuses on pre-planned experiences, the growing appeal of serendipity seekers highlights a deeper consumer longing for authentic, unplanned adventures that break away from over-curated itineraries.

### Bring spontaneity to customer experience

In a world where everything is optimised and pre-planned, voice tech offers something different: natural, in-the-moment interaction. With **73% of hotel guests preferring multilingual voice assistants**, the opportunity exists to build voice experiences that respond in real time, surface relevant suggestions, and adapt to changing needs. As adoption continues to grow, voice is becoming an essential tool for enabling personalised discovery.



## INNOVATIONS



### Alibaba's travel service support flexible, real-time travel choices

In April 2025, Fliggy, Alibaba Group's travel platform, introduced AskMe, an AI-powered assistant designed to act like a human consultant. Drawing on Fliggy's proprietary data for flights, hotels, and experiences, AskMe generates real-time, editable itineraries. Travellers can make instant changes with a single click, and the assistant updates plans immediately. AskMe supports voice input in various dialects and presents visual content such as maps, images, and product details. Users can also create hand-drawn guides for social media, and the service is accessible via both text and voice.



### Ever-changing podcast reacts to listener's surrounds

Walkcast is a dynamic podcast that adapts to the listener's real-world location. Powered by a series of AI agents that curate facts, script content, and deliver narration, Walkcast creates an infinite audio journey. Launched in

October 2024 by UK-based creative studio oio, the project is entirely user-funded. Contributors are credited by name in episodes they help support. When credits run out, the experience pauses until topped up, keeping the platform community driven.



### AI concierge adapts to traveller moods in real time

Emerging Travel Group has launched a smart recommendation engine that uses AI to tailor travel suggestions based on user behaviour, preferences, and emotional cues. By analysing tone and urgency in voice interactions, the system can shift from recommending a peaceful countryside retreat to a spontaneous city break, depending on the traveller's mood. Integrated across voice, chat, and app interfaces, the concierge provides real-time, context-aware suggestions that evolve with the user's journey. This approach shows how voice and AI can bring spontaneity back to travel, helping customers discover unexpected experiences while maintaining the convenience of digital planning.



## OPPORTUNITIES



### Context, sentiment and intent

Voice technology can detect tone, mood, and urgency, allowing brands to respond with the right kind of support. Whether offering a shortcut when someone sounds rushed, providing help when they are frustrated, or adding something playful when the mood is light, brands can create customer journeys that feel like genuine conversations instead of scripts.



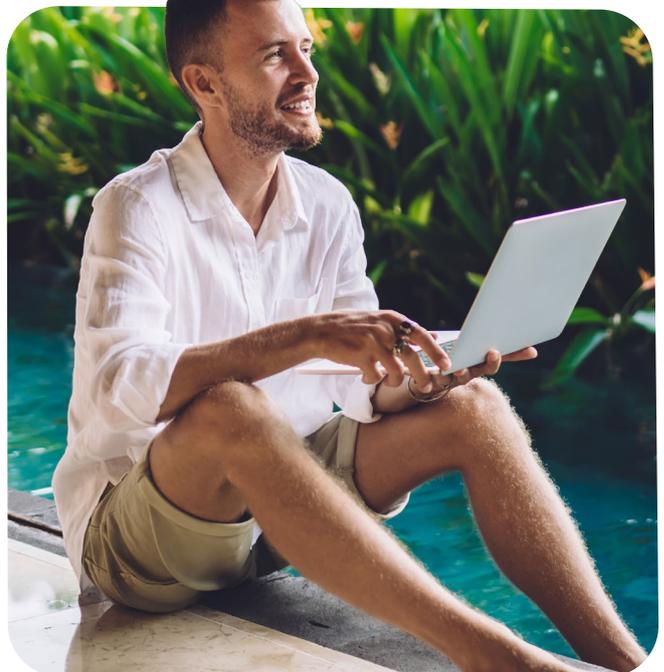
### Curate the unfound

Go beyond the “most booked” or “highest rated.” Brands can stand out by surfacing what algorithms often overlook, such as a hidden gallery, a forgotten hiking trail, or a neighbourhood bakery. Use data to highlight authentic experiences, not just the popular ones.



### Leave room to surprise

Surprise can come not only from what’s offered, but also from how it’s delivered. Brands build trust by meeting travellers where they already are, being present on their preferred channels, and making voice or human support available when needed. It is about knowing when to step in and when to let the journey unfold naturally.



TREND 3:

# ROOTED ROADS

// Where culture leads the way

Travellers have long craved authentic connections. But in an era of hyper-globalised hospitality, **true cultural immersion is harder to come by**. Travellers will seek out trips that go beyond surface-level access, offering deeper entry points into local tradition and communities. This includes experiences that invite guests to step outside their comfort zones while staying rooted in the culture of the place.



## DRIVERS



### Enhanced cultural immersion

Authentic cultural immersion remains a top priority for travellers, with **73% of global tourists seeking local experiences to fully immerse themselves in a culture**, especially when travelling with children. Rather than just being a tourist, many now look to **engage with the customs, local communities, and everyday life of the places they visit**.

### The algorithmic tourist trap

But as interest in cultural immersion grows, the tools travellers use to find it are creating a paradox. While **4 in 10 travellers worldwide are turning to generative AI** for itinerary planning, and **two-thirds of Gen Z travellers look first on social media**, especially TikTok, for trip inspiration. What were once personal experiences have been streamlined into viral checklists: the same scenic hikes, the same market stalls, the same picture-perfect restaurants. They're easy to recommend and easy to share but often stripped of deeper cultural context.



**What was once discovery now risks becoming repetition, as destinations are curated for the algorithm rather than for genuine connection.**



### The rise of heritage tourism

Travellers are prioritising immersive, meaningful experiences that connect them to local history, culture, and community: **56% of all travel in 2024 centred on cultural heritage**, and **63% of travellers are actively seeking ancient traditions and heritage-based experiences** for their 2025 holidays. The global heritage tourism market, valued at USD 604.38 billion in 2024, **is projected to reach USD 778.07 billion by 2030, growing at a CAGR of 4.5% from 2025 onward**.

## INNOVATIONS



### Marriott introduces RENAI, a voice-activated cultural concierge

To enhance cultural immersion in hospitality, Marriott launched RENAI, an AI-powered voice concierge piloted in select Renaissance Hotels. RENAI combines human-curated local insights with conversational AI to deliver real-time, voice-based cultural guidance. Guests can ask questions such as “What is the story behind this neighbourhood?” or “How do I greet someone in Thai?” and receive rich, contextual responses that go beyond basic travel tips. Supporting multiple languages and offering pronunciation help, RENAI adapts to guest preferences and transforms the hotel stay into a gateway to local culture. By making cultural understanding more accessible through conversation, it helps guests feel more connected to what’s around them.



### Kyoto’s AI voice guide app brings cultural storytelling to life

In Kyoto, travellers can explore heritage sites through an AI-powered voice guide app that delivers immersive, voice-led narratives at key landmarks. Using geolocation

and natural language interaction, the app provides cultural stories at temples and historical sites, allowing users to ask follow-up questions, select the tone of narration, and switch between dialects or languages. This transforms passive sightseeing into active cultural engagement, offering on-demand cultural context and real-time voice interaction.



### In Egypt, Visa turns a local phrase into ad power for small businesses

Launched in Egypt in March 2025, Visa’s Walla Visa? campaign transforms a common checkout phrase into real-world advertising support. The expression ‘Cash Walla Visa?’, instinctively used by merchants, is widely understood as shorthand for all card payments. Seeing an opportunity, Visa turned those organic mentions into marketing. AI-powered voice devices installed in partner stores track in-store mentions of ‘Visa’ during customer interactions. Each mention automatically earns the store credit towards sponsored ads on TikTok, Instagram, and beyond. The more it’s said, the more visibility a store gains, giving small businesses a new way to grow using the words they’ve always used.



## OPPORTUNITIES



### Cultural context, on demand

Smart service now blends seamlessly with cultural immersion, often in unexpected ways. Kyoto's AI-powered voice guide app shows how voice-led storytelling can bring local culture to life in real time. For businesses, this opens up opportunities to use voice and AI to deliver on-demand translation, cultural context, and recommendations that reflect the unique spirit of a place. The result is more than just a service. It becomes a story that connects travellers more deeply to their surroundings.



### Cultural intelligence, built in

Planning tools may get travellers from A to B, but they can also help people understand where they are. Marriott's RENAI concierge demonstrates how voice and AI can move beyond logistics to offer deeper cultural insight, from explaining local customs to helping with pronunciation. For brands, embedding this kind of intelligence into digital experiences can help guests feel more informed, more confident, and more connected to the places they visit.



### From friction to connection

Voice provides a human-centred way to support travellers, especially in unfamiliar cultures. It allows for experiences where language, accent, and local expression become bridges to connection rather than barriers. Through real-time translation or culturally aware virtual agents, voice can act as a guide, enhancing immersion, highlighting local identity, and turning everyday interactions into meaningful moments.



## TREND 4:

# RIGHT TO ROAM

## // Redefining what welcome means

From neurodivergent explorers to queer adventurers, **underrepresented travellers are reshaping what inclusive travel looks like**. And as their presence grows, so too does the responsibility (and opportunity) for brands to create experiences that respond to a broader spectrum of identities and needs.

Forward-thinking hospitality brands are using AI and voice technology to turn good intentions into meaningful action by creating systems of awareness and support that adapt to the full spectrum of human experience. With programmable voice and messaging tools, brands can build services that listen deeply, respond empathetically, and adapt in real time. Tuning into individual needs and identities helps to redefine what it truly means to feel welcome.



## DRIVERS



### Identity shapes the journey

According to Booking.com’s latest LGBTQ+ Travel Report, **83% say their wellbeing is their top priority when planning a trip**. And that concern runs deep: 65% say their identity directly influences the choices they make. Worryingly, **62% have felt the need to hide or downplay their identity just to feel secure**. This data points to a clear truth: travel still isn’t equally safe for everyone.

### Designing for minds that travel differently

For neurodivergent travellers, the world isn’t always built to support how they process and move through it – and travel can amplify that disconnect. **49% report negative travel experiences directly related to their neurodivergence**, and 50% say a lack of inclusivity limits their travel choices. At the same time, **66% show strong interest in technology that can ease the journey**, tools that provide real-time updates, alert them to noise or crowds, and suggest quiet spaces.



### Empathy, on call

The ability to feel heard is core to feeling welcome. According to Twilio research, **69% of people say they’re more likely to buy from a brand again if they feel listened to**, yet 54% say they’re often not heard by customer service. For underrepresented travellers, that disconnect hits harder, especially when digital tools fail to respond with empathy or nuance. Voice technology, when designed inclusively, can bridge this gap.

## INNOVATIONS



### Rome airport partners with Be My Eyes for real-time vision assistance

Be My Eyes announced its collaboration with Fiumicino Airport in March 2025 to enhance travel accessibility for blind and low-vision passengers at the airport, which serves over 40 million passengers annually. The collaboration integrates Be My Eyes' Service Connect platform into airport services, allowing travellers to access real-time assistance through the Be My Eyes app.



### All aboard the future of accessible AI with Zoe

MSC Cruises has set a new standard for accessible guest service with Zoe, the cruise industry's first in-cabin, multilingual voice assistant. Designed to support guests of all ages and abilities, Zoe is available in every stateroom and can respond to over 800 of the most frequently asked questions about onboard services, entertainment, and amenities. The system was developed specifically to make information accessible for guests

with mobility or visual impairments, providing hands-free, voice-activated support in seven languages. Since its launch, Zoe has answered millions of guest queries, helping to reduce queues at guest services and ensuring that every traveller can access the information they need from the comfort of their cabin.



### AI-powered digital assistant for accessible passenger support

Southampton Airport launched "Hello Southampton," an AI-powered digital assistant designed to enhance the travel experience for all passengers, particularly those with accessibility needs. Accessible via QR codes throughout the terminal, the assistant offers real-time flight updates, navigation help, and tailored support. First trialled at Glasgow Airport, the technology reduced customer service queries by 50%, supported over 12,300 extra passengers each year, and achieved an 86% satisfaction rate. Southampton has since expanded the tool as part of its commitment to accessibility, recently earning the Civil Aviation Authority's highest "Very Good" rating for inclusive travel.



## OPPORTUNITIES



### Human > machine

While automation helps streamline tasks, it can fall short in moments that call for care. Twilio research shows that **68% of people tune out when interactions lack clarity**, and younger travellers are more likely to feel rejected when they don't feel heard. For those navigating unfamiliar places or with invisible needs, these moments matter. Voice and AI systems that respond with empathy and context can offer support that feels personal and builds real trust along the way.



### Design for difference

There's also growing demand for systems that recognise differences by default. As travellers bring a wider range of identities, needs, and expectations to the table, designing for the average is no longer enough. The opportunity lies in creating adaptive, flexible experiences that empower



### Small shifts, big impacts

Inclusive innovation isn't always about building something new. Often, it starts with reimagining existing tools, services, or offers to better meet the needs of overlooked travellers. Brands don't need to have all the answers – they need to invite dialogue. With flexible APIs, brands can co-create solutions with the communities they serve, ensuring that every interaction is not just functional, but genuinely relevant.



TREND 5:

# SIGNATURE STAYS

## // The rise of real-time recognition

**Forget one-size-fits-all hospitality.** As AI systems move from passive support to active agents, the travel and hospitality industry is turning to real-time personalisation – shaping guest experiences dynamically based on preferences, behaviours, and in-the-moment inputs.



## DRIVERS



## Hyper-personalisation on the rise

From predictive playlists to conversational assistants, today's travellers are bringing their everyday tech standards with them – and expecting the same from travel providers. With the global market for travel customisation **projected to reach USD \$620.71 million by 2032**, the question isn't whether personalisation matters, it's why a hotel wouldn't know a guest's preferences as well as their streaming app does.

## Data for value

Willingness to share personal data is no longer a barrier to personalisation. Research shows that **92% of travellers would exchange personal information for discounts**, and 90% for loyalty points. This signals a growing comfort with trading data for tangible value. For businesses, the challenge is no longer access, but using data in ways that feel valuable, respectful, and truly responsive to individual needs.



## The future of search

Thanks to generative AI and natural language tools, people are searching less with checkboxes and more with **feelings, moods, and open-ended prompts**. For hospitality brands, that means learning to understand more fluid, emotional inputs—and turning them into relevant, personalised experiences.

## INNOVATIONS



### AI-powered hotel in Las Vegas to redefine hospitality

The Otonomus Hotel, opening in March 2025 in Las Vegas, promises to be the world's first fully AI-powered hotel, combining personalisation and efficiency. Located near the Strip, Otonomus offers customised stays through two proprietary AI systems: FIRO, an AI booking engine optimising room allocations, and KEE, an app that serves as a digital concierge and key. Guests can personalise everything from room preferences to service options via gamified onboarding and AI-driven data collection, creating tailored experiences. The hotel operates with lower costs, using automation and minimal staff, while offering travellers a unique, tech-forward alternative to traditional accommodation.



### Holiday rentals site introduces AI-powered visual search engine

In October 2024, Denmark-based holiday home marketplace Landfolk launched Daisy, an AI-powered visual search tool that lets users discover holiday homes by describing or

selecting images that match their desired vibe, such as 'cosy cabin by the lake'. The feature followed a €10.3 million funding round in July 2024. Landfolk plans to further integrate AI into property curation and seasonal optimisation. At launch, the photo-based browsing experience didn't support filtering by specific dates, locations, or amenities.



### Swiss start-up simplifies multi-channel booking for independent hotels

Since its founding in 2018, Swiss start-up Nivula has supported independent and boutique hotels by centralising communication channels with its software, Dialogo. It integrated Twilio's Conversations API to unify calls, emails, and messages (including SMS, WhatsApp, Facebook Messenger, and Google Business Messages) into a single platform. Dialogo enables hotels to manage customer interactions, track reservation details, and automate support in multiple languages. A Genoa hotel using Dialogo achieved 90% occupancy and high customer satisfaction within six months of opening, underscoring Nivula's market impact and readiness for global expansion.



## OPPORTUNITIES



### Your stay, your say

Voice is a powerful tool for real-time personalisation. By layering spoken intent with contextual signals like past preferences, current location, or emotional tone, brands can shape experiences that feel intuitive, responsive, and personal. These voice-driven interactions reduce friction and add a human touch, transforming standard services into signature moments that are customised to each guest.



### Feelings as filters

What used to be a functional, behind-the-scenes tool is now a central part of how consumers discover and shape their journeys. As travellers use more expressive prompts (like 'cosy cabin by the lake'), they're setting new expectations for technologies that can understand emotion, context, and intent. This move from rigid filters towards more natural inputs is reshaping personalisation into more human experiences.



### Seamlessly connected service

With programmable communications APIs, independent hotels can unify guest conversations across voice, messaging, and support on a single platform. This allows teams to respond quickly and consistently, creating a smooth, multi-channel journey that feels personal at every touchpoint, without the need for large-scale operations.



### Bespoke by default

Tech-powered hospitality providers like The Otonomus Hotel are proving that automation and personalisation can go hand in hand. For guests, it sets new expectations around personalised experiences; for hotels, it unlocks greater efficiency and lower overhead.

## CONCLUSION



**In this report, we explored **five trends** shaping the future of travel and hospitality: *AI Genies, Serendipity Seekers, Rooted Roads, Right to Roam, and Signature Stays.***

As technologies like **voice and AI** become deeply embedded in everyday decision-making, travellers now expect services that are not only efficient, but also responsive, inclusive, and attuned to their needs in the moment.

Voice technology is emerging as a cornerstone of this transformation. It enables faster, more natural interactions – especially in situations where typing or tapping creates barriers. Voice empowers travellers to act on the go, access information in unfamiliar environments, and receive support in real time. Beyond convenience, voice and AI can interpret urgency, tone, and mood, allowing brands to respond with empathy and relevance. These technologies also drive accessibility, supporting multilingual communication and ensuring that more travellers feel heard and included.

For brands, this is a chance to redefine what meaningful service looks like. It calls for adaptive systems that can listen as well as inform, and for experiences that are seamless across every channel. Communications platforms that enable real-time voice interactions, intelligent messaging, and AI-powered personalisation are already helping brands deliver on these new expectations.

When integrated thoughtfully, voice and AI are more than features – they are the foundation for building lasting connections, trust, and loyalty. As travel becomes more fluid, inclusive, and emotionally intelligent, technology partners like Twilio are helping brands listen better, respond faster, and welcome every traveller, wherever their journey takes them.





# Ready to reimagine your guest experience?

Discover how Twilio's voice and AI solutions can help you deliver seamless, personalised service at every touchpoint.

[Learn more](#)