

Booking.com THE GLOBAL AI SENTIMENT REPORT

Artificial intelligence - generative AI in particular - is accelerating change across every industry, including travel, and represents the new frontier of globalization: breaking barriers, connecting people, and driving innovation for the greater good. It's our opportunity to build a smarter, more inclusive, and connected world. At Booking.com, this technology is the heart of the innovation we are leading to build the future of travel technology.

For decades, Booking.com has set the benchmark for AI innovation in the travel industry. From our earliest applications of machine learning to the latest AI advances, we have continually enhanced every aspect of the customer journey. With the rapid acceleration and immense force of generative AI, we are embracing this momentum to transform how people search for, book and experience travel, further advancing our mission of making it easier for everyone to experience the world. Our leadership in AI is not simply about deploying new tools, but about shaping how those tools deliver real-world value for travelers and partners around the globe.

As the public and private sectors continue to invest in AI as a catalyst for growth,

we are entering a new era of adoption: one that brings significant opportunity, but also shared responsibility. Building trust, ensuring transparency, and prioritizing safety are essential as we guide our customers, and the travel industry at large, into this new chapter. We embrace this responsibility, aiming not only to advance Al innovation, but also to lead by example in its ethical and responsible deployment.

Guided by our commitment to learning and collaboration, we set out to understand how people truly feel about AI. Through comprehensive research spanning over 37,000 respondents across 33 countries, we explored people's attitudes towards AI, how they use it today, and what they want from it in the future.

With this report, we aim to offer new insights and bring perspectives to the forefront that will help shape the next chapter of AI in travel and beyond. As a global leader in online travel, we understand that thriving in the AI era, much like in travel, requires adaptability, agility and the relentless pursuit of exploring new horizons. Now is the time to forge the future, together.



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Glenn Fogel

CEO, Booking Holdings



We are on the edge of the most radical reinvention travel has ever seen. Generative AI isn't just enhancing experiences – it's changing everything we know about how people dream, plan, and book their journeys.

At Booking.com, we've been building toward this moment for years – and what's coming with agentic search will make today's innovations look primitive. The next generation of journeys will be intuitive, intelligent, and deeply personal.

AI at the Crossroads of Enthusiasm and **Apprehension**

Excitement around AI grows each day, with most people already reaping its benefits to help make daily tasks easier, enhance learning opportunities, work more efficiently and productively. From a travel perspective, this means making trip planning and booking more intuitive. the mainstream, which is why As adoption ramps up, however, consumers are now tempering their excitement with questions about how far they want AI solutions

to go, especially when it comes to Al-generated information and AI completing tasks for them.

This tension between curiosity and caution is natural when a transformative technology enters businesses such as Booking.com are putting their customers' needs and expectations first as they develop new Al innovations.





Acceptance Starts with Trust

of consumers fully trust AI, with many fact-checking its outputs

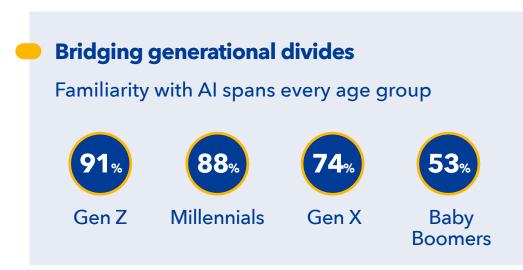
of respondents in EME* (29%) and NORAM^{*} (32%) distrust Al-generated information

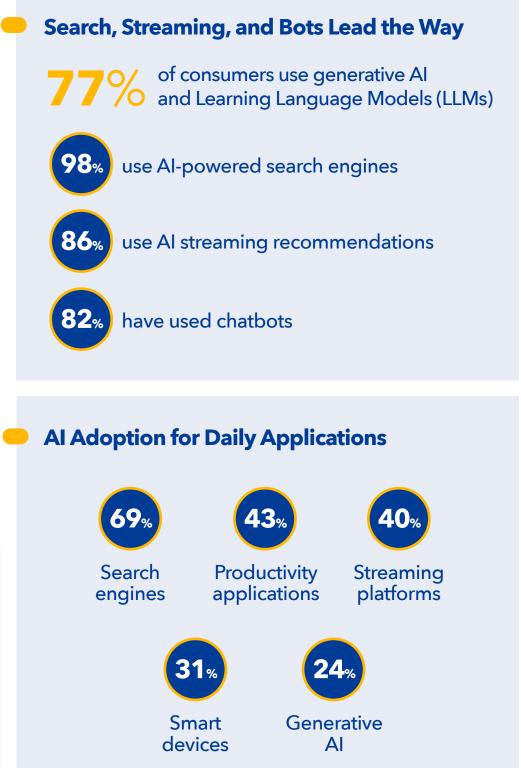
LATAM^{*} (15%) and APAC^{*} (16%) are more positive, with just 17% expressing distrust for Al-generated information

A Global Phenomenon Takes Flight

The pace of AI innovation and adoption is unmatched by any other technology. AI-powered search, media streaming and chatbots are already the norm for most consumers, who have begun to embrace a broader spectrum of AI services for specific daily tasks. Though adoption is higher among younger cohorts, especially Gen Z, familiarity with AI is high across generations, including more than half of Baby Boomers.

Sentiment around AI is split, however, with 50% of consumers considering themselves AI Advocates and Enthusiasts, 22% categorizing themselves as AI Skeptics or Cautious, and the rest feeling neutral about the technology, its reliability, and use cases.







25%

9%

have questions about Al's

development, reliability,

and use cases

identify themselves as Al Skeptics, and have some doubts about how useful

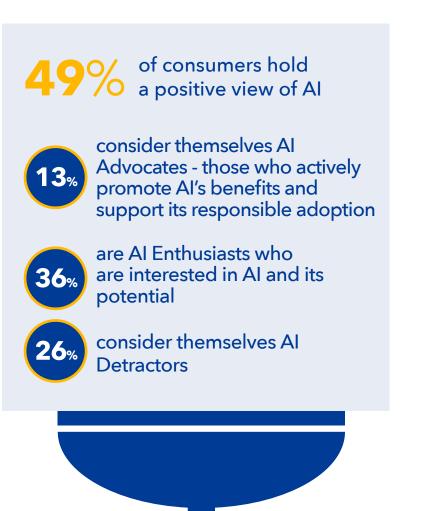
are AI Cautious - and have

13% concerns about how AI might be used or developed

or reliable AI is

Booking.com

Al Sentiment is Split Down the Middle





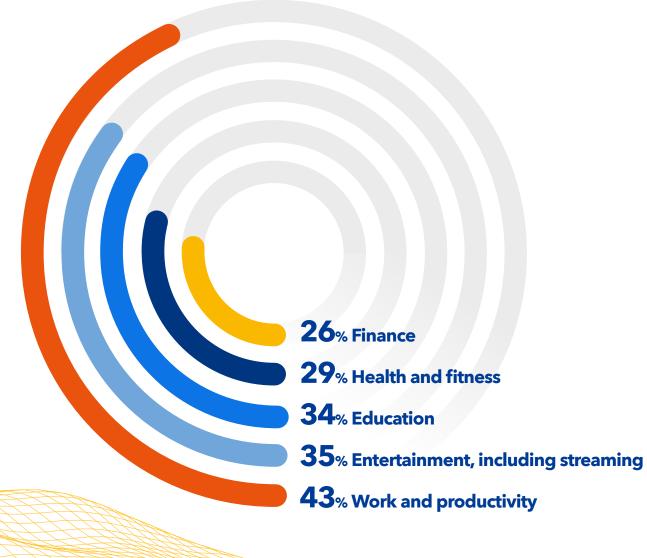


Usage & Industries

Al Goes Mainstream

Al is to the consumer experience what electricity was to the modern world, driving a tectonic transformation in people's daily lives. Once reserved for developers and IT experts, Al technologies have grown more accessible and relevant for consumers, with 35% excited by the technology's potential to help them make smarter and more efficient decisions across a range of applications.

Top AI Use Cases





Assistance Over Autonomy

Al Adoption is Rapid, but the Lack of a Human Touch Still **Causes Doubts**

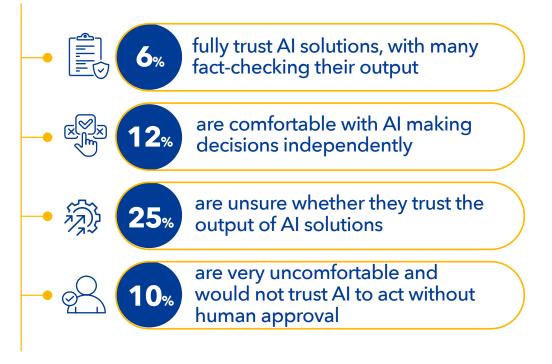
Al adoption is accelerating, but consumers struggle to trust the technology completely. Ninety-one percent (91%) have at least one concern about AI and most still fact-check the output of their AI solutions. This is especially true in Europe & Middle East (EME) and North America (NORAM) where 30% of EME and 32% of NORAM consumers distrust Al-generated information.

As AI models continue to learn iteratively and mirror the critical-thinking capabilities of the human mind, it will be crucial for developers and users alike to understand how these solutions work and validate what they produce.





Uneasy



As the most confident Al users, Al Advocates embrace AI with minimal hesitation, while AI Enthusiasts require more transparency, control, and reassurance to trust in the technology. For instance, while half (48%) of AI Advocates feel very comfortable letting AI make decisions independently, this is only the case for 13% of AI Enthusiasts. One line that neither Advocates or Enthusiasts are willing to cross, however, is removing all human involvement from decisionmaking.

Autonomous Intelligence Makes Consumers

Keeping AI Human and Ethical

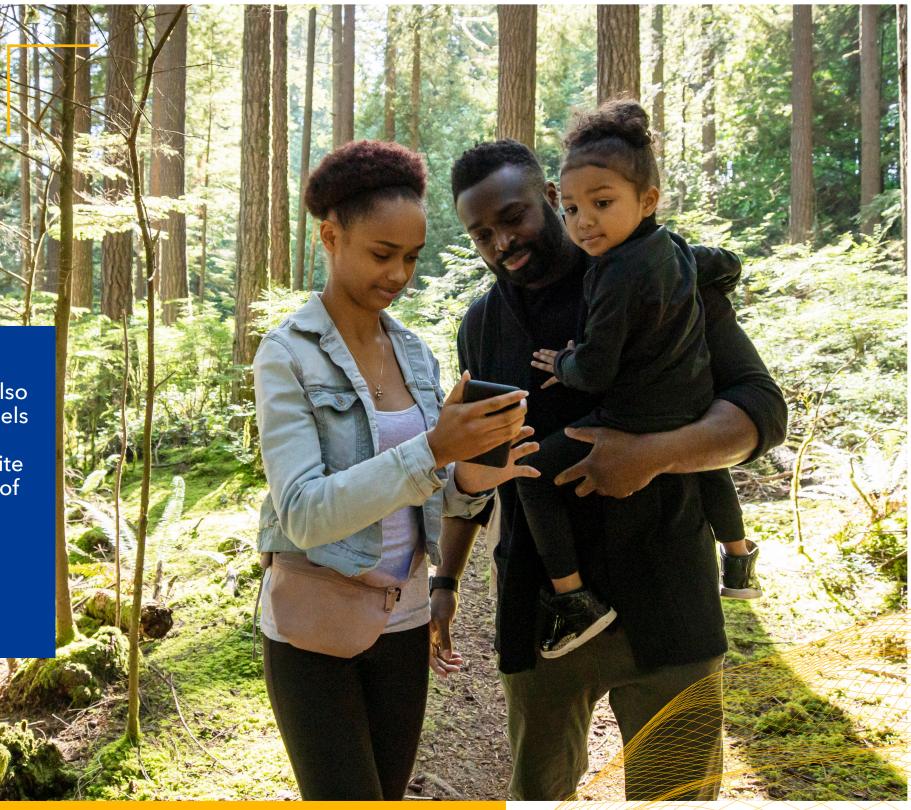


The results of this substantial survey confirm the paradox of generative AI: while it's being used at scale consumers are also wary about the outputs. They're right to be cautious: AI models are designed to generate content that's plausibly correct rather than be 100% accurate. It's heartening then that despite hyped-up claims that AI is either at or nearing human-levels of intelligence, consumers are approaching it with caution and healthy skepticism – particularly around autonomous AI.

Graham Lovelace

Al writer & strategist, Charting generative Al





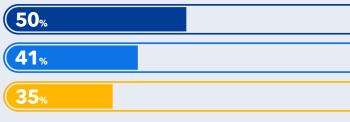
Bridging the Divide Between Advocates and Enthusiasts

Consumers are questioning how Al providers use and manage their data when training their models and developing their services. AI Advocates are more trusting in this regard. (50%) are willing to share their healthcare data with AI service providers, compared with the global average of just 33%, and 41% are willing to share their financial information, compared with a global average of 25%.

Advocates and Enthusiasts are **Divided on Sharing Data**

- Al Advocates: Open and Willing
- Al Enthusiasts: Excited but Cautious
- **Global Average**

Healthcare data



Financial details

41%	
32%	
23%	

Personal identification data

33%		
25%		
18%		





As AI continues to weave itself into our daily lives, it's natural for users to feel a degree of hesitation, especially when it comes to sharing their data. To address this, and to cultivate a healthy level of confidence, as an industry we must ensure that Al development follows industry standards in data privacy, security, and AI ethics. For Booking.com, this goal is key in protecting the trust we've built with travelers and

Chief Security Officer (CSO), Booking.com

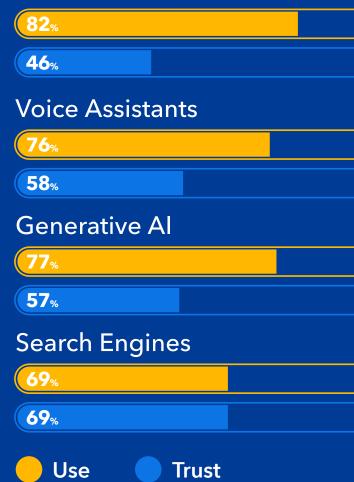
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Al Use is Up, but Trust Lags Behind

Al Tool

Chatbots





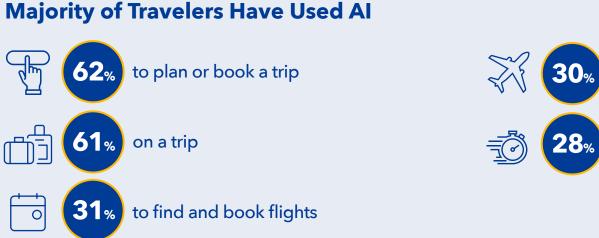
TRUST LEVELS & AI ADOPTION

A Prime Opportunity to Innovate and Assist **Travelers**

Organizations in every industry are investing in, developing, and rolling out new AI solutions. According to Stanford University, U.S. private investment in AI hit \$109.1 billion in 2024¹. Stanford's research also revealed generative AI solutions have gained particularly high momentum among businesses.

This bodes well for the travel industry, where generative AI and agentic AI technologies promise to deliver new levels of speed, precision, and personalization for customers. For their part, travelers believe in the power of AI to personalize their experiences and help them explore their passions, like responsible tourism.





to book accommodation

to save time by automating parts of the journey



AI is especially well planted in the global travel ecosystem, with 67% of travelers having already used the technology when going on a trip at least once. This puts the travel industry in an advantageous position where many of their customers are on-board with the technology that is shaping the future.

However, this promise is tempered by a worry among many that AI could embed or amplify bias in travel-related services by excluding certain demographics or making the experience less inclusive. This tells us Al's role in transforming the travel industry is just as much about trust as it is about transformation and getting both correct will define the leaders of tomorrow.

'Yolanda Gil and Raymond Perrault, "The 2025 AI Report Index", Stanford University. https://hai.stanford.edu/ai-index/2025-ai-index-report

How Travelers Want AI To Improve Their **Experiences**



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47%

38%

worry AI could

introduce bias that

or discrimination

fear the technology

will deprioritize budget travelers

reinforces stereotypes

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66%

63%

Weighing up the Benefits of AI Decision-Making

say AI will make travel easier and

more efficient

inclusion

believe it promotes

Despite global hesitancy about sharing their data with Al services, 86% of consumers feel comfortable sharing personal data with Al as part of their travel experience. In fact, their trust in using Al assistants for travel has already outpaced their trust in recommendations from work colleagues and influencers.

Al emerges as a more trusted source for travel planning







For over a decade, AI and machine learning models have played a key role in driving more relevant experiences for Booking.com customers. Today, we are working to significantly enhance these efforts by unlocking customer intent, delivering deeper personalization and better connecting the end-to-end trip experience.

This is evident in the solutions we've already created: from smart search filters that help match a traveler with their 'perfect' property, to tools that offer instant answers to specific questions, we are continuing to leverage Al in support of our mission to make it easier for everyone to experience the world.

Adrienne Enggist Senior Director of Product, Marketplace, Booking.com

Al is transforming how we travel, powering more seamless and personalized experiences across every stage of the journey. From planning to customer service and operational automation, travel companies are embracing AI, across the value chain, to enhance how people discover, book, and experience destinations. Industry momentum is strong: 65% of professionals surveyed by Euromonitor International's Digital Consumer Survey plan to invest in generative Al over the next five years.

center.



But with innovation comes responsibility. Booking.com's research reveals trust is still a hurdle. 91% of travelers have concerns about AI, and only 35% fully trust its outputs. For AI to truly deliver, travel brands must adopt it transparently, ethically, and with people at the

A World Divided

While excitement and familiarity with AI are high, the research shows an attitudinal divide emerging in the world.

LATAM & APAC consumers are becoming frontrunners when it comes to embracing excitement and trust in AI. Testing out its capabilities, they are the most optimistic about future transformation and are rapidly integrating it into their everyday routines.

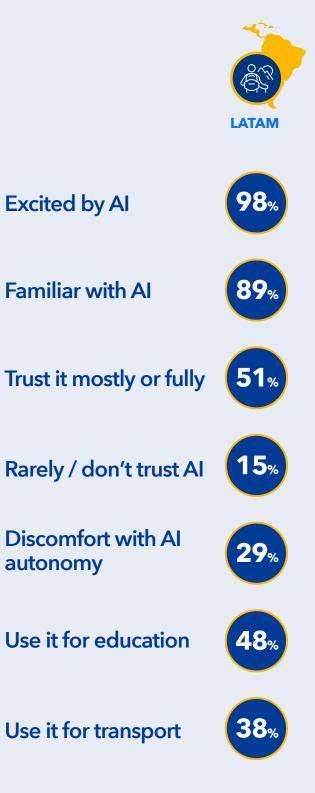
In NORAM and EME, while consumers accept AI will transform the world, they remain cautious in using the technology day-to-day and challenge the information AI shares with them.

Driven by this openness and commitment to progress, consumers

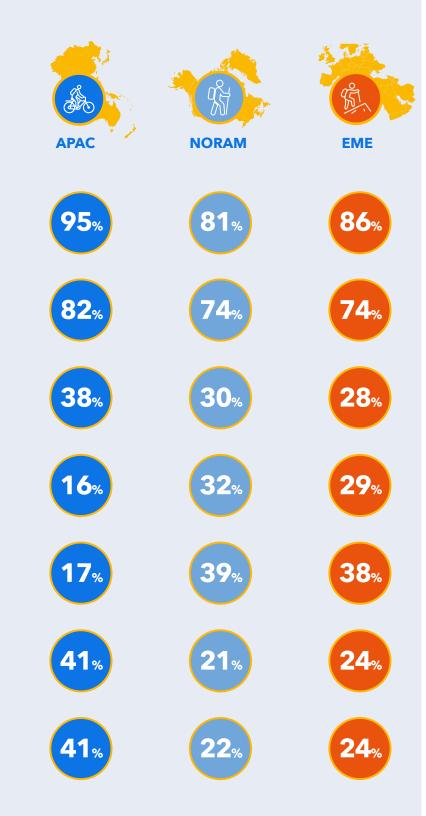
in LATAM and APAC are changing their daily lives, shaped by a future of AI, in their eagerness to adopt new technology at a fast pace.

By contrast, consumers in NORAM and EME have grown skeptical despite these regions developing many of the technologies that dominate today's AI market.

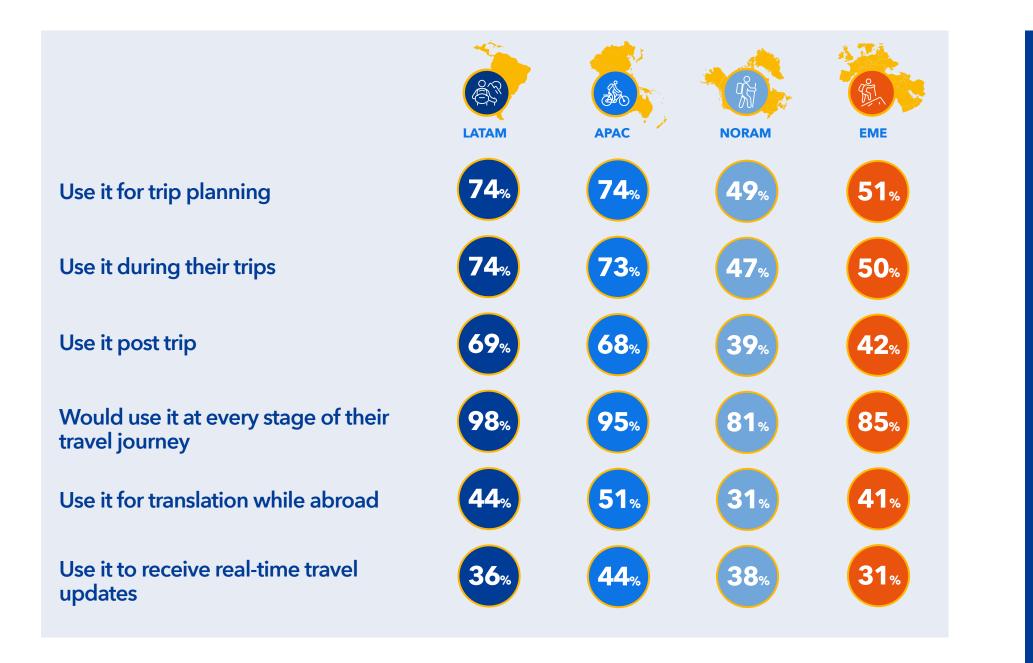
In part, this may be due to governments and regulatory bodies in these regions interrogating its usage, causing consumers to step back. Now more than ever, governments and businesses across the world need to work in tandem with each other, to collaborate on the latest innovations, discuss learnings and ensure the advancements are shared equitably amongst all, so no one is left behind.







In travel, LATAM and APAC are embracing the latest technology to discover and plan their next trips, while NORAM and EMEA lag behind in upgrading how they plan and navigate travel.



Travel is one of the clearest signals of how AI is delivering real value at scale. Booking.com's new research shows how quickly and deeply Al is becoming embedded in everyday life. In fact, 62% of travelers have already used it to plan or book a trip, especially Gen Z, Millennials, and those in LATAM and APAC.

We're seeing similar momentum in ChatGPT, with over 500 million weekly users and more than a billion weekly searches just six months after launch. In travel, the impact is especially clear: tools like Booking.com's Al Trip Planner and Smart Filters help people find trips that aren't just faster to plan, but more personal and inspiring. This kind of adoption happens when technology meets a real need and travel is where high intent, high complexity, and high expectations converge.

Colin Jarvis OpenAl



Head of Global Forward Deployed Engineering,

Generative AI represents one of the most significant technological shifts of our era, fundamentally reshaping how consumers engage with the world around them. As this technology matures, it's not only transforming how companies like ours anticipate and meet evolving customer needs, it's also raising the bar for what travelers expect from every interaction.



The opportunity ahead is tremendous. At Booking.com, we've long been at the forefront of Al innovation, integrating advanced machine learning to enhance the customer journey at every touchpoint. But as we enter this next phase, our responsibility goes beyond technology. Building trust, ensuring transparency, and prioritizing safety are critical as we guide travelers, and our industry, into the future.

James Waters Chief Business Officer, Booking.com



Methodology

This global quantitative research study was conducted via an online questionnaire between April and May 2025, gathering responses from 37,325 people across 33 markets. Argentina: 1012, Australia: 1013, Austria: 500, Belgium: 1000, Brazil: 2006, Canada: 1007, China: 2018, Colombia: 1023, Croatia: 509, Denmark: 508, France: 2031, Germany: 2033, Hong Kong: 1006, India: 2004, Ireland: 504, Israel: 505, Italy: 1000, Japan: 1029, Mexico: 2014,

Netherlands: 1008, New Zealand: 1015, Portugal: 1013, Singapore: 1002, South Korea: 1006, Spain: 1006, Sweden: 502, Switzerland: 501, Taiwan: 1022, Thailand: 1002, UAE: 513, UK: 2005, USA: 2004, Vietnam: 1004. As a leading digital travel platform exploring the role of AI, Booking.com conducted this study to better understand how people around the world are using, trusting, and responding to AI in both everyday life and travel.

