



Valtech's Global Travel & Hospitality 2025 Outlook



Contents

Introduction	03
Slow and soft travel x Adventure travel	05
Ultra-customizable bookings x All-inclusive itineraries	12
The luxury influence x Post-luxury consumption	19
Increasing fragmentation x Decreasing loyalty	26
What's next?	30



01

Introduction



The global travel and hospitality industry has never been more dynamic

Geopolitical tensions, economic uncertainty, and the acceleration of emerging technologies are reshaping how, why and where people travel. Five years post-pandemic and a quarter into the 21st century, one thing is clear: unpredictability is the new constant.

This is no longer a return to normal—it's a reinvention of what travel and hospitality even mean.

Amid these shifts, our team has sifted through the noise to identify the most critical global trends and emerging consumer behaviors that will shape the next wave of transformation.

The future of the industry isn't on the horizon—it's unfolding right now.



02

Slow and soft travel



Adventure travel



Trends:
Slow and soft travel

Slow travel highlights a global yearning for simplicity, authenticity and immersion

Across the board, slow travel — a mindset that emphasizes taking one's time to be truly present and immersed throughout a trip — is being named one of the most influential travel trends of 2025. Highly related trends, like “soft travel” and “JOMO” (“the joy of missing out”), point to a consumer desire to wholly and truly get away, unplug and unwind.

- **Hilton** lists Soft Travel as 1 of 4 new vacation trends for 2025 and says 22% of travelers plan to getaway for self-discovery or mental health this year.
- **Conde Nast** names slow travel as an umbrella connecting many of its niche trends, from JOMO to longer honeymoons and family sabbaticals.
- **Expedia** reports that 62% of travelers say that slow travel reduces stress and anxiety, while nearly half say it allows them to better reconnect with loved ones.

Sources:
[Hilton](#), [Conde Nast](#), [Expedia](#).





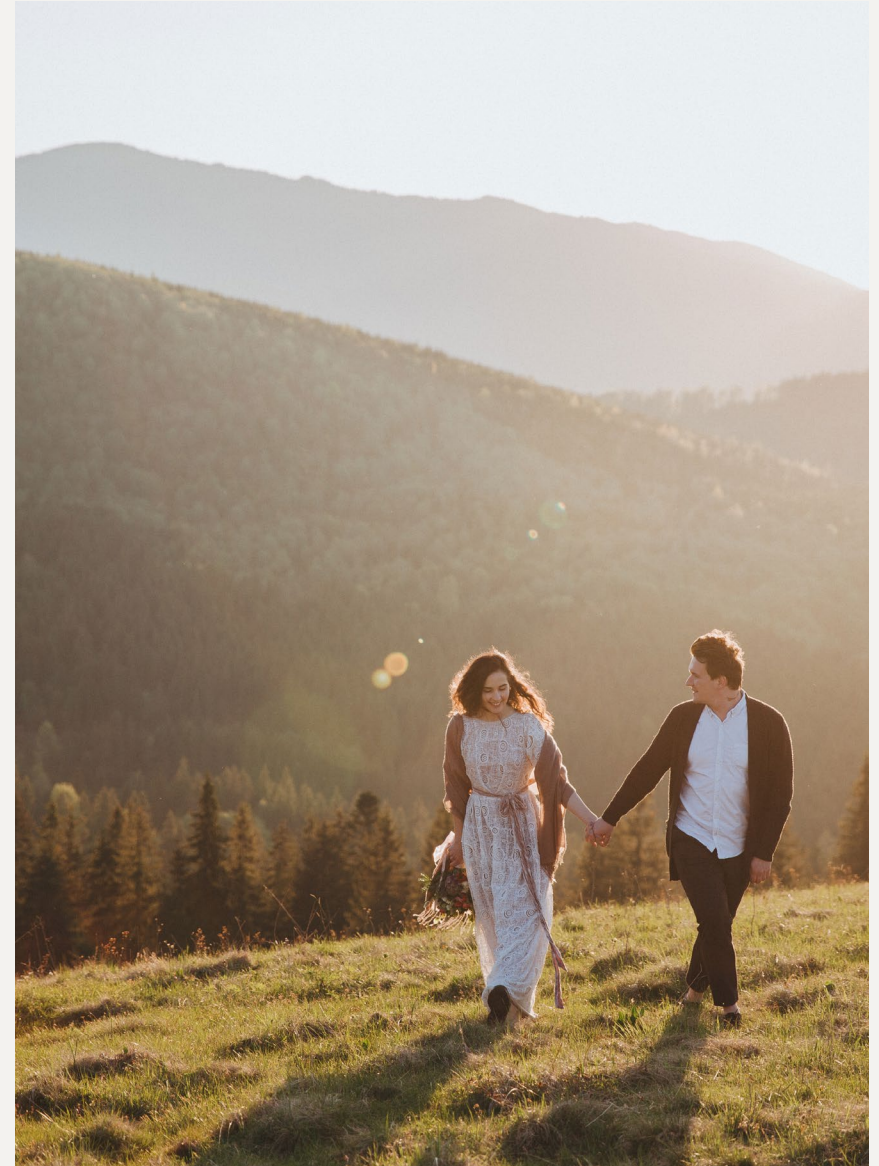
Trends:
Adventure travel

Adventure travel suggests a growing desire for the truly unique and unexpected

In 2025, more travelers will seek out thrilling, unique adventures that push the boundaries of traditional travel experiences. This trend points to consumers' willingness to take risks and try new things, all for the sake of experiencing something truly unforgettable.

- **Lemongrass** Travel PR reports that "frontier tourism" — a highly elite version of adventure travel — continues to gain popularity despite exorbitant costs.
- **Skift** reports that "exploring new destinations" is a top travel goal for this year and says adventure travel is on the rise.
- **Hilton** says "1 in 4 travelers in 2025 plan to seek unique experiences," underscoring their desire to take one-of-a-kind vacations.

Sources:
[Lemongrass](#), [Skift](#), [Hilton](#).





Two opposing trends, one common insight

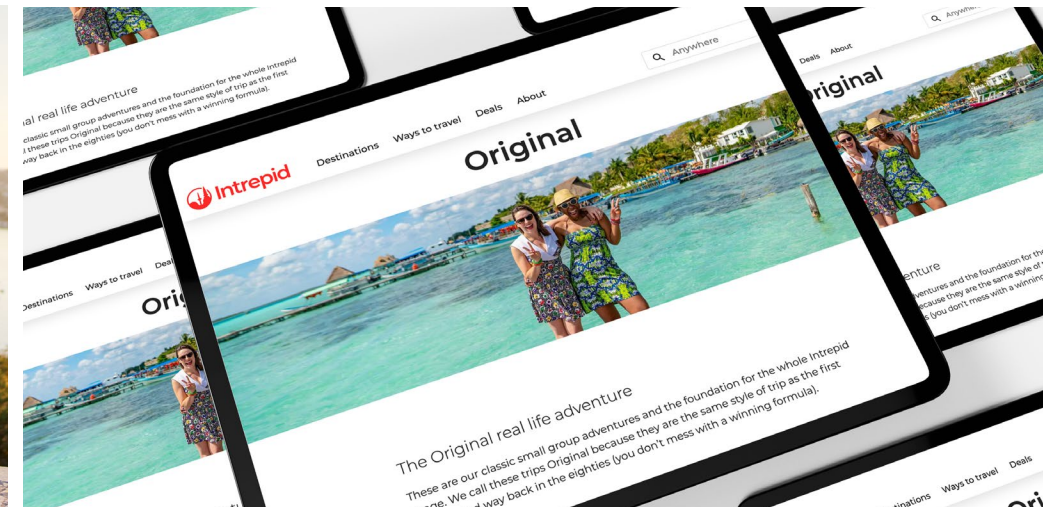
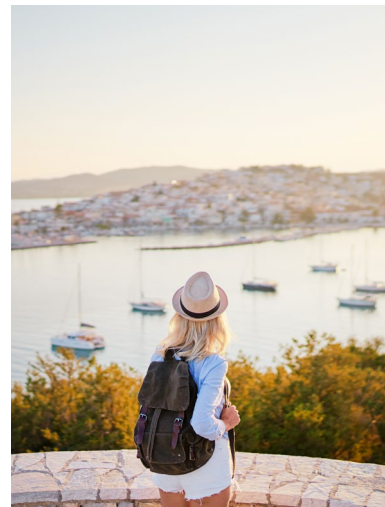
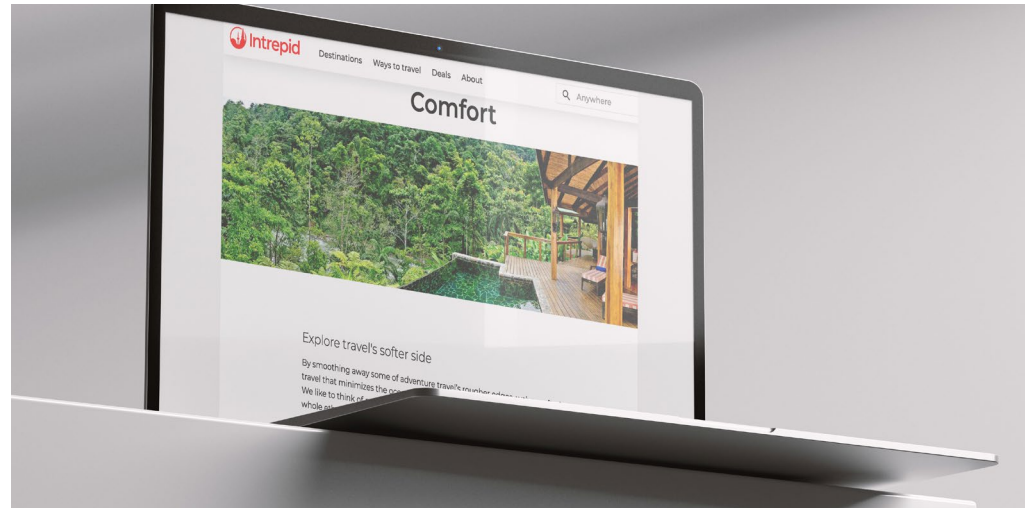




What we're already
seeing in the market

Intrepid

Intrepid Travel, an itinerary-planning platform, offers diverse styles, from “Comfort” trips focused on soft travel to more adventurous itineraries. In both cases, the company emphasizes authentic local touches that make every itinerary feel “connected” and “entrenched” to its region.

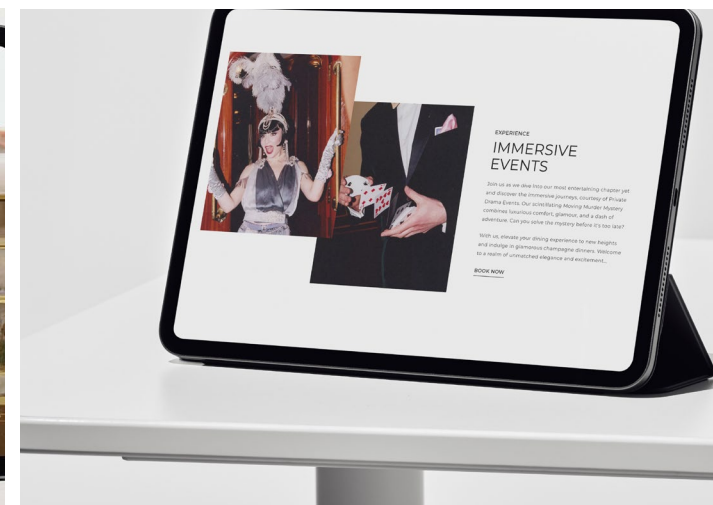
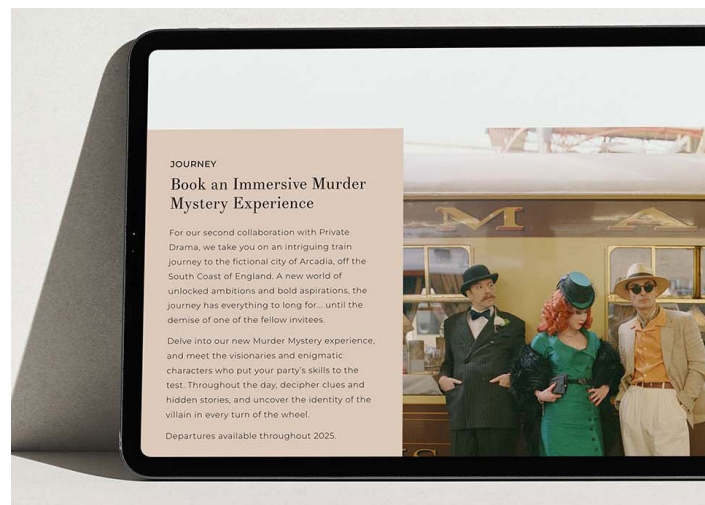




What we're already
seeing in the market

British Pullman Train

The resurgence of luxury train travel reflects a growing preference for the "slow travel" style and prioritizing the journey itself. The Belmond British Pullman embodies this trend, highlighting their unique amenities and offering immersive onboard experiences like a bookable "Murder Mystery Experience".





What we're already
seeing in the market

Newfoundland and Labrador Tourism

Newfoundland and Labrador's tourism campaign highlights immersive experiences like whale watching and coastal hikes while focusing on deeper connections and authenticity. The campaign positions the province as a destination for travelers seeking meaningful engagement over typical tourism.





03

Ultra-customizable bookings



All-inclusive itineraries



Trends:
Ultra-customizable bookings

Ultra-customizable bookings usher in a new era of hospitality

In March 2024, Sabre predicted that attribute-based selling would be a “game-changer” for the hospitality industry. Entering 2025, it’s clear they were right. The ability to make bookings that blend highly specific attributes — a south-facing corner room on a higher floor, for example — is rapidly gaining popularity, with good reason: it maximizes corporate profits and consumer customization. Brands across the travel industry, from airlines to cruises, will be forced to respond as consumer demand for this capability gains traction.

- **Marriott** unveiled a \$1 billion digital transformation, a key part of which will be a transition to attribute - based booking.
- **Phocuswrite** reports that 62% of hotel operators are investing heavily in attribute-based selling technologies to increase revenue.
- **Skift** emphasizes that hotels “will start selling much more than rooms” as technology enables new upselling capabilities.

Sources:
[Marriott](#), [Phocuswrite](#), [Skift](#).





Trends:
All-inclusive itineraries

All-inclusive itineraries make a comeback with younger travellers

It all began on TikTok. #allinclusive gained steady popularity before blowing up last year on the social media platform, driving a resurgence among Gen Z, who are just now entering their travel eras. In truth, all-inclusive brands have been reinventing themselves for years, elevating their offerings in order to rebrand the concept of all-inclusive as higher-end. This seems to have worked: 38% of Gen Z say they are drawn to all-inclusives for the “feeling of luxury.”

- **Expedia** reports that 42% of Gen Z say an all-inclusive vacation would be their preferred way to travel.
- **Hotel.com** searches using the “all-inclusive” filter jumped by 60% from 2023 to 2024.
- **Forbes** says “a new era of all-inclusive luxury” will take off in 2025.

Sources:
[Expedia](#), [Phocuswrite](#), [Forbes](#).





Two opposing trends, one common insight







What we're already seeing in the market


Expedia


Expedia has embraced ultra-customizable bookings by integrating numerous amenities and attribute-based filters, allowing users to tailor their searches for a highly personalized travel experience.


Amenities


 Airport shuttle included (19)


 Hot tub (16)


 Pool (53)


 Ocean view (15)


 Spa (4)


 Kitchen (104)


 Restaurant (34)


 Gym (44)


 Electric car charging station (16)


 Outdoor space (113)


 Air conditioned (183)


 Water park (18)


 Parking (172)


 Cribs (52)


 Casino (0)


 Wifi Included (191)

 Pet friendly (95)

 Golf course (0)

 Washer and dryer (7)

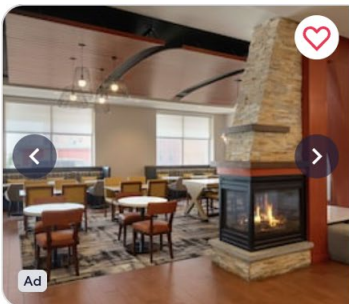
 Bar (31)



8.8

Excellent

1,092 reviews



Ad

8.8

Excellent


1,010 reviews

Hampton Inn Portland Downtown Portland

Breakfast included

Downtown Location + Free B

Newly renovated in the heart indoor pool & next-door rest




8.8

Excellent

1,008 reviews

The Westin Portland Downtown Portland




9.0

Wonderful

2,065 reviews

La Quinta Inn & Suites Portland

Breakfast included



8.8

Excellent

1,092 reviews

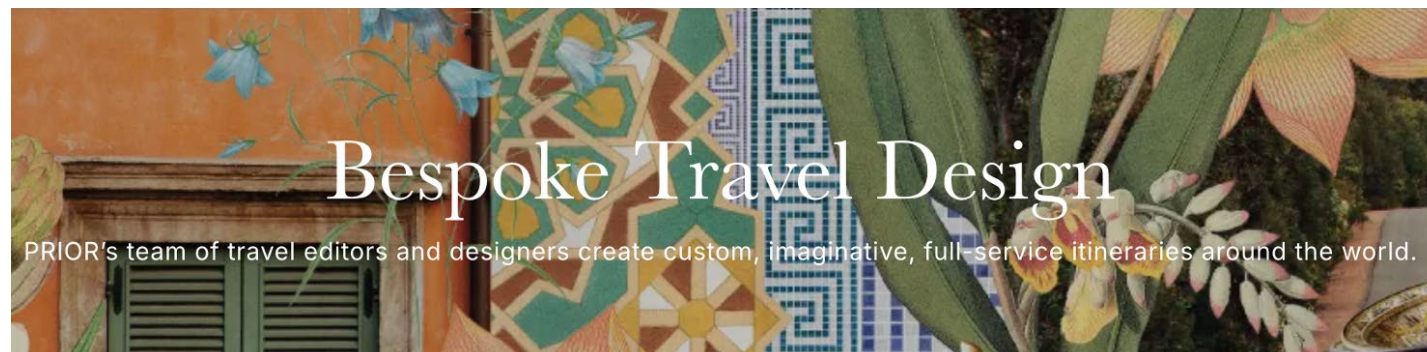
Cambria Hotel Portland East Bayside



What we're already
seeing in the market

Prior: Bespoke travel design

Travel company Prior offers a “Bespoke Membership”, which include custom, one-of-a-kind itineraries. They're one of many travel companies crafting similar offerings, with a focus on enabling travelers to create something truly customized — curated by themselves and experts at the same time.



SINGULAR & CUSTOMIZED

One-of-a-kind itineraries that combine
your interests with access to our world.

Custom travel offers full-service
itineraries *only*.



What we're already
seeing in the market

Journee

Journee has gained popularity for offering ultra-curated surprise trips that take care of the planning and are based entirely on travelers' preferences. The shareable, destination-reveal experience has resonated on social media, appealing to those seeking personalization without the hassle.





04

The luxury influence



Post-luxury consumption



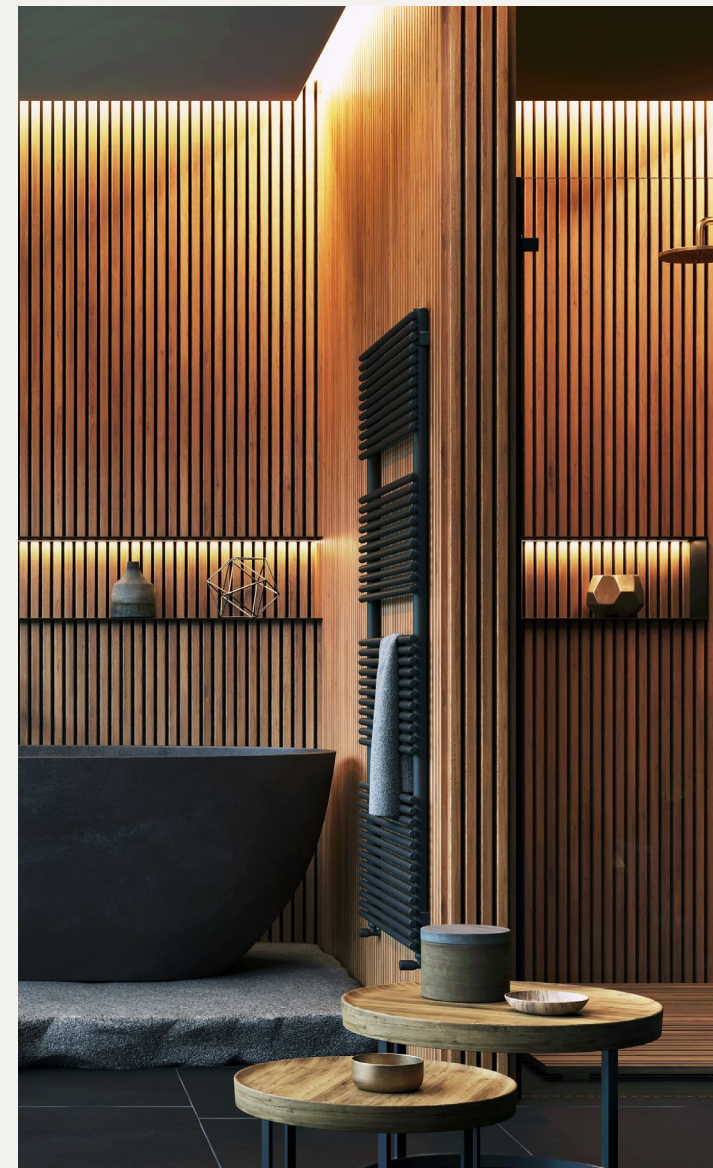
Trends:
The luxury influence

Luxury travellers increasingly influence the market, driving expectations (and opportunities)

“Demand for luxury tourism is expected to grow faster than for any other industry segment. This growth is being powered in part by a sharp rise in the number of individuals globally with net worths between \$1-30 million. But it’s also resulting from a large and expanding base of aspiring luxury travelers with net worths between \$100,000 and \$1 million, many of whom are younger and increasingly willing to spend larger shares of their wealth on upscale travel options.” (McKinsey, 2024). We will continue to see proliferated luxury offerings as well as “premiumization” as a key business strategy, even for budget brands.

- **Virtuoso** reported a 25% increase in luxury travel sales in 2024, with bookings of \$50k and higher up by 57%, reflecting a strong demand for premium travel experiences.
- **Hilton** calls luxury travelers a key “rising traveler type” in their 2025 trends report. Notably, Hilton’s luxury portfolio surpassed 500 properties worldwide in 2024.
- **Frontier Airlines** is just one US budget carrier going premium; many other airlines are also rolling out new first class and premium offerings in 2025.

Sources:
[Virtuoso](#), [Hilton](#), [Frontier Airlines](#).





Trends:
Post-luxury consumption

In a “post-luxury” age, travellers are drawn to new markers of luxury that will shape the whole industry

“Post-luxury,” in tandem with the “quiet luxury” and “soft luxury” trends, highlights the shift away from opulent, status-driven consumption towards something more conscious and intentional. As high-net-worth travelers make this shift, we’ll see aspirational consumers quickly follow. Brands will have to respond with an even stronger focus on authenticity, wellness and sustainability.

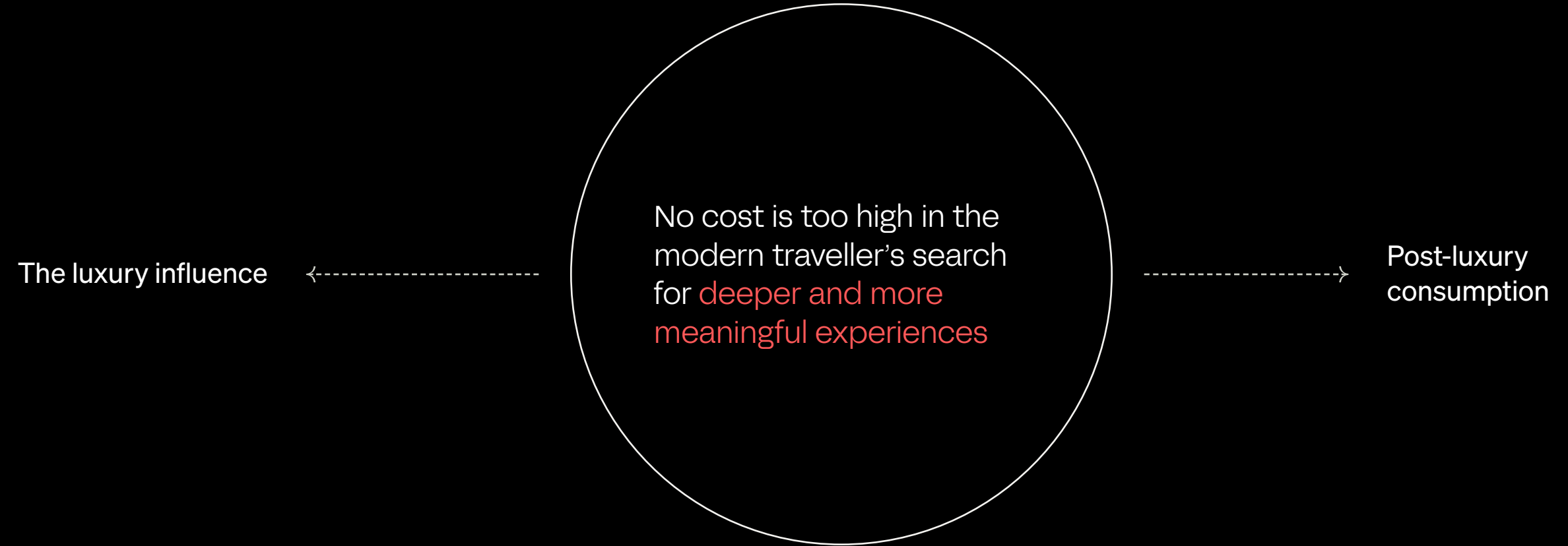
- **Conde Nast** dubbed one of their 2025 trends “The Anti Butler Boom,” highlighting the evolving values and preferences of luxury travelers.
- **Skift** highlights the challenge for legacy luxury brands, predicting an increase in partnerships and sub-brands to meet consumer needs.
- **McKinsey** reports that 80% of the luxury leisure market is made up of people below the age of 60, emphasizing the younger traveler’s increasing influence.

Sources:
[Conde Nast](#), [Skift](#), [McKinsey](#).





Two opposing trends, one common insight

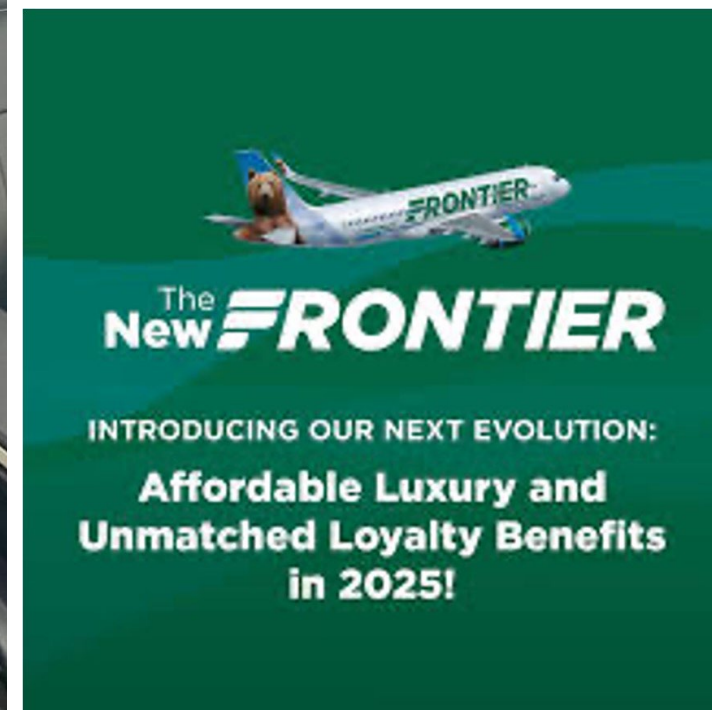




What we're already
seeing in the market

Budget airlines go premium

Budget airlines like Frontier, Spirit and Ryanair are introducing premium offerings, such as extra legroom seating, priority boarding and bundled amenities, to attract travelers seeking a premium experience positioned as “affordable luxury”.

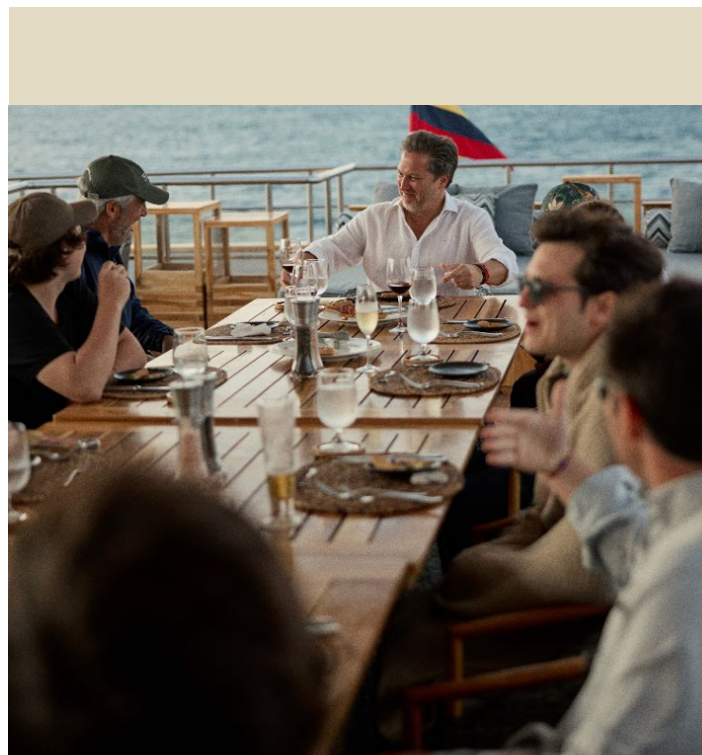




What we're already
seeing in the market

Luxury travel companies emphasize community and connection

Increasingly, we are seeing luxury travel companies honing in on the desire to connect more meaningfully. ASmallWORLD is a “community for modern luxury travelers” offering membership perks, itineraries, events and gatherings. Meanwhile, Abercrombie & Kent continues to roll out more small group journeys for travelers “seeking shared adventures.”



SMALL GROUP JOURNEYS

Join the Adventure

Our guided journeys redefine the group tour, bringing together a select collective of like-minded travellers seeking shared adventures and meaningful connections.



A community for luxury travellers

ASmallWORLD is the trusted community for modern luxury travellers. Find inspiration, book unique journeys, and connect with like-minded members.

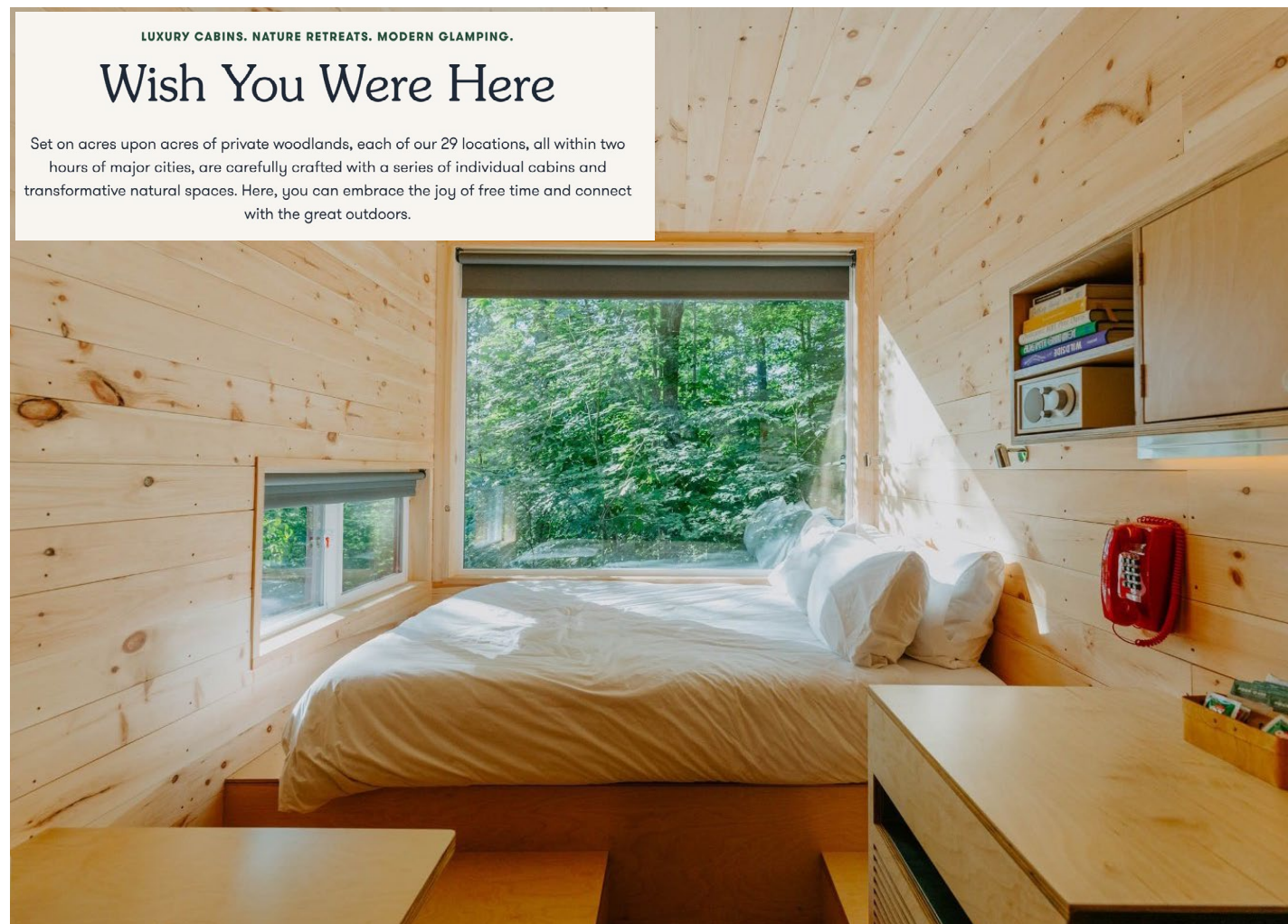


What we're already
seeing in the market

Postcard Cabins

In December of 2024, Marriott announced its acquisition of glamping startup Postcard Cabins, a “luxury outdoor hospitality” brand.

The glamping trend, in general, points to a reshaping of luxury travel to include more than just 5-star hotels, but also intimate, natural settings that emphasize meaningful immersion.





05

Increasing fragmentation



Decreasing loyalty



Trends:
Increasing fragmentation

Travellers will make more bookings across more channels

We are on the cusp of a new era for travel bookings. The rising popularity of social commerce and, more dramatically, ChatGPT has led to a significant shift in online behaviors that will continue to rapidly evolve. Travelers are moving away from Google and are increasingly relying on social platforms and AI tools, as well as third-party players like credit cards, to conduct their travel research and ultimately make bookings.

- **Skift** predicts that Google's share of the US search ad market will fall below 50% in 2025.
- **Statista** reports that mobile devices represented around two-thirds of global travel and hospitality websites' traffic in 2023.
- **McKinsey** says that 47% of experience bookings still happen offline, emphasizing the industry's lagging move to digital.

Sources:

[Skift](#), [Statista](#), [McKinsey](#).





Trends:
Decreasing loyalty

Brands will be increasingly challenged to earn guest loyalty

As travelers shift between booking platforms — whether it's mobile apps, online aggregators or social media channels — they are less likely to form deep loyalty to a single brand. Fragmentation has also made it easier for consumers to compare prices across a wide array of platforms, leading to increased price sensitivity. The heyday of loyalty programs is over, as consumers enroll in many more without genuinely engaging.

- **Trivago** indicates that 71% of U.S. consumers meticulously compare prices for vacation accommodations to secure the best deals.
- **BCG** reports that the average U.S. consumer now belongs to more than 15 loyalty programs — a 10% increase from 2022.
- **Forbes** predicts an impending “midlife crisis” for travel loyalty programs, calling for innovation in the way we recognize guests.

Sources:

[Trivago](#), [BCG](#), [Forbes](#).





Two opposing trends, one common insight





What we're already seeing in the market

OneAir: AI-driven travel subscription

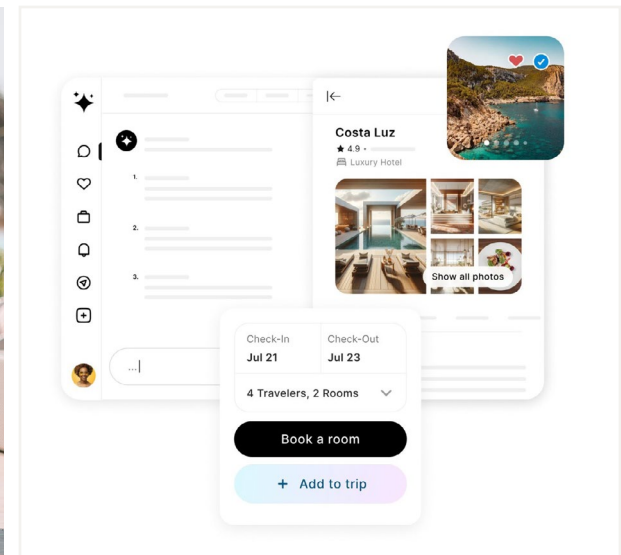
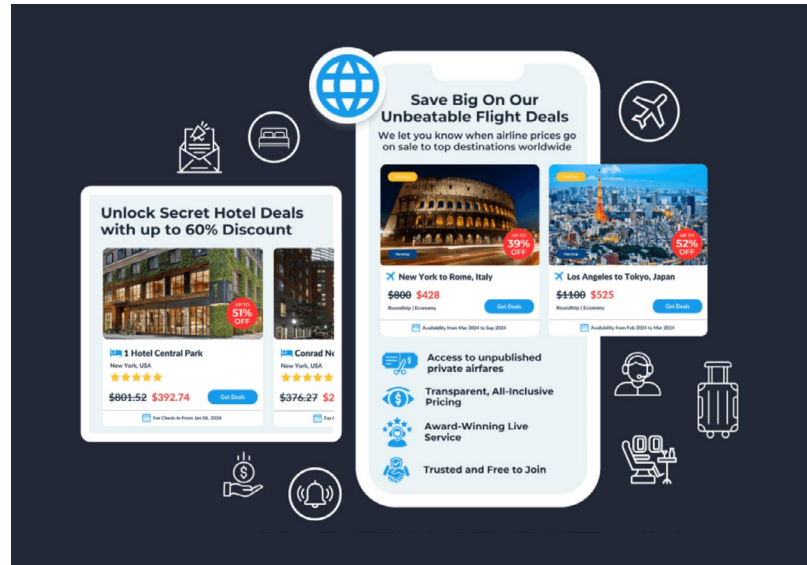
OneAir is a private, AI-powered, members-only travel app offering exclusive access to hidden rates on top hotels and flights worldwide, with discounts of up to 60%. It offers lifetime subscriptions, letting members pay once and get cheaper deals and rewards for life — surefire way to lock in loyalty.

Mandarin Oriental

Bespoke rewards scheme Mandarin Oriental's Fans of M.O program eschews points-based loyalty in favor of deeper guest engagement. Members who book directly with the brand enjoy flexible privileges, spontaneous rewards, member-only events and access to Mandarin Oriental's culinary, wellness and travel experts. The more frequently guests book, the more exclusive, distinctive and personalized their stays become.

One-stop vacation planning

Travel brands like Marriott and easyJet are launching all-in-one booking platforms to fight fragmentation. Vacations by Marriott Bonvoy and easyJet holidays let guests combine flights, hotel stays and car rentals at incredibly competitive rates. Flexibility is key to these platforms' success, with guests able to choose from thousands of options, make last-minute changes and spread the cost of payment.





06

What's next?



What's next?

The modern traveler wants to have it all. Slow, immersive experiences and thrilling, unique adventures. Hands-on levels of customization and hands-off, all-inclusive stays. Luxury travel but with a focus on authenticity, wellness and sustainability.

And no wonder.

For the past five years, brands have promised travelers custom experiences, personalized

adventures and seamless journeys. In 2025, we've reached an inflection point — it's now or never. They have to deliver.

Drastic changes in consumer behaviors and preferences are coming. Travel brands will be forced to reckon with these changes, whether they're prepared to or not. The brands that will win the future of travel are the ones that finally give consumers everything they want — that let them have it all.



“

The brands that will win the future of travel are the ones that finally give consumers everything they want.



Key takeaways

- 01 Consumers seek slow travel experiences that allow them to be truly present and immersed. At the same time, they want thrilling, unique adventures that push the boundaries of traditional experiences.
- 02 Ultra-customizable bookings are ushering in a new era of hospitality that maximizes corporate profits and personalization. But younger travelers still seek the feeling of luxury that only comes with an all-inclusive experience.
- 03 Demand for luxury travel is expected to soar, fueled by higher net worths and even higher aspirations. However, more consumers are shifting from status-driven consumption to conscious, intentional post-luxury experiences.
- 04 The travel market is fragmenting under pressure from AI and media, which are rapidly changing online behaviors. As travelers shift between booking platforms, brands will have to fight to earn customer loyalty.



Contributors

Valtech is the experience innovation company.

We exist to change the way people experience the world through advanced digital technologies, data and design.

We do this by bringing together a global network of engineers, designers, analysts, and CX professionals with a proven ability to accelerate business growth by transforming clients products, services and systems.

Our global footprint allows us to deliver impact at scale. While our nimble teams bring the agility and adaptability that allow us to create breakthrough innovation and speed-to-market.



Lori Esposito

VP, Head of Client Services,
Global Travel Vertical Lead,
Valtech

lori.esposito@valtech.com



Raquel Dalarossa

Associate Creative Director
of Experience Strategy, Global
Travel Vertical Strategy Lead,
Valtech

raquel.dalarossa@valtech.com



Lindsey Fee

Senior Strategist,
Valtech

lindsey.fee@valtech.com