CRITEO

Spring/Summer 2026 Travel Pulse

GLOBAL

The new era of travel

Insights on behaviors, budgets, and booking trends

In 2026, travel demand isn't the problem. Converting it is.

The path to booking has grown more complex. Economic pressure, geopolitical tensions, and regional disruptions are reshaping where people go and how they decide.

Today's travelers rarely move in straight lines. They compare more and hesitate longer. They move across channels, revisit decisions, and weigh trade-offs with greater scrutiny. The result is a more deliberate, but far less predictable, path to purchase.

Drawing on data from hundreds of travel providers, alongside insights from more than 14,000 consumers worldwide, this report unpacks what's shaping traveler behavior now, and what it takes to turn intent into bookings in an increasingly fragmented landscape.

The State of Travel Demand

01

Booking Behavioral Shifts

02

Today's Traveler

03

Budgets Meet Bucket List

04

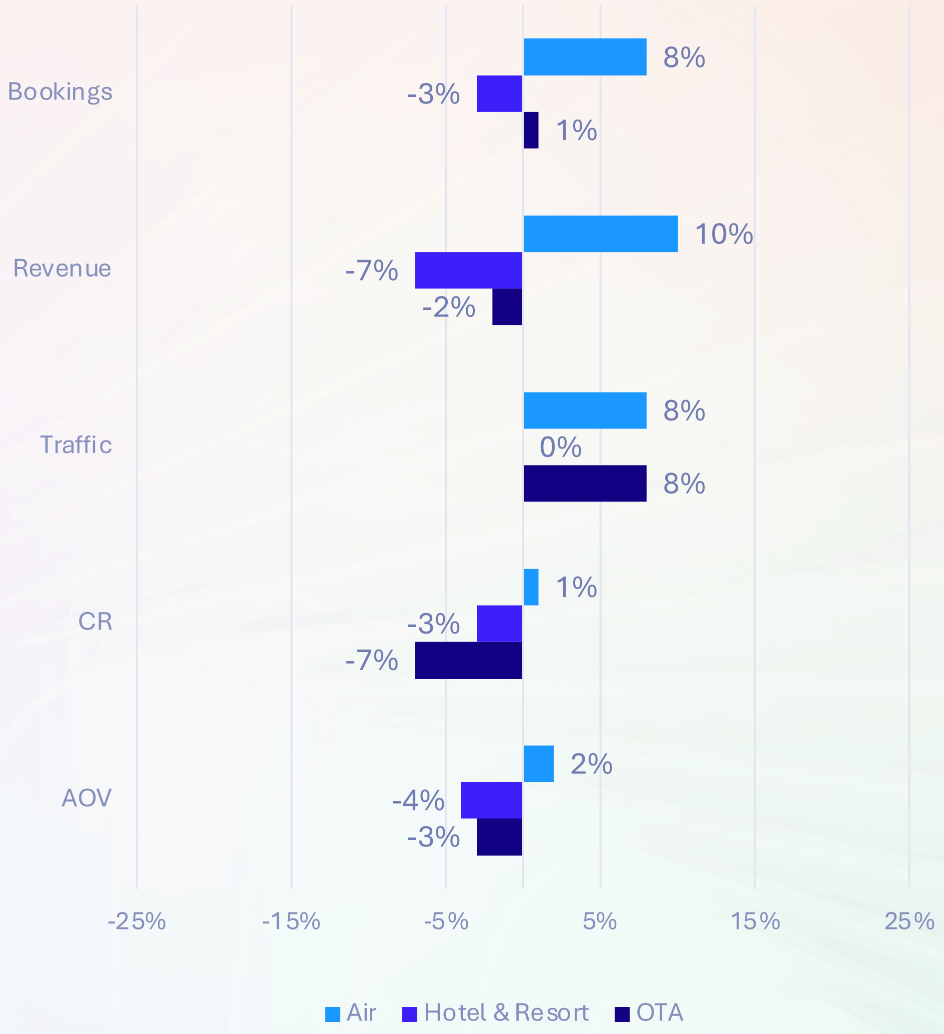
01

The State of Travel Demand

Travelers are back, but deliberate in how they book

In Q1 2026, global travel demand increased, with traffic up across most segments. This supported gains in bookings and revenue, driven primarily by air performance.

However, conversion rates declined, with the steepest drops in OTAs (-7%). At the same time, average order value remained flat or negative, pointing to continued pressure on monetization despite rising demand.

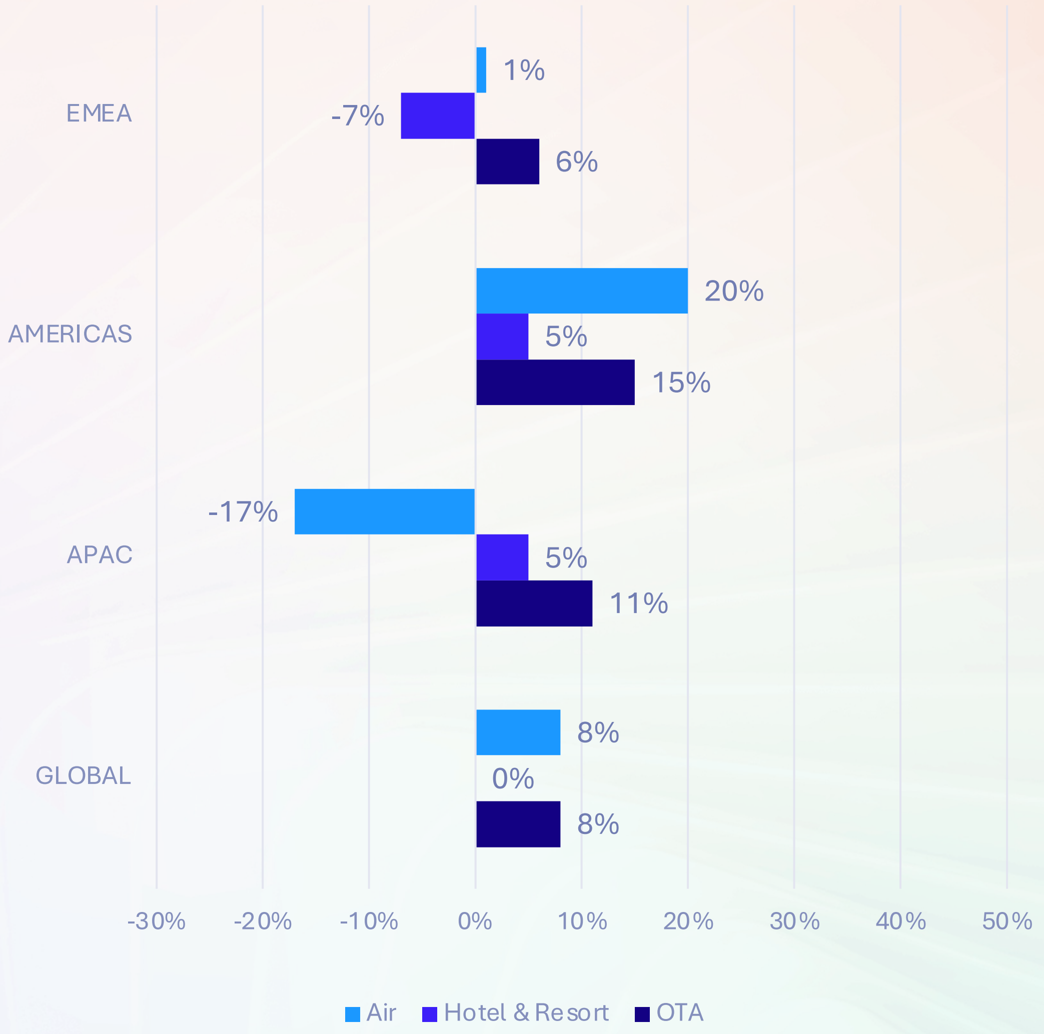


Source: Organic Criteo Data. Year-on-Year Online Metrics, GLOBAL– January to March 2025 and 2026.

More travelers are exploring options online

In Q1 2026, online traffic increased +8% YoY, driven primarily by air demand. The Americas led growth, with air traffic up +20%, alongside gains in hotel and OTAs.

Regional performance diverged elsewhere: APAC experienced a 17% drop in air traffic, offset by continued growth in OTA and hotel, while EMEA remained mixed, with modest OTA gains despite declines in other segments.

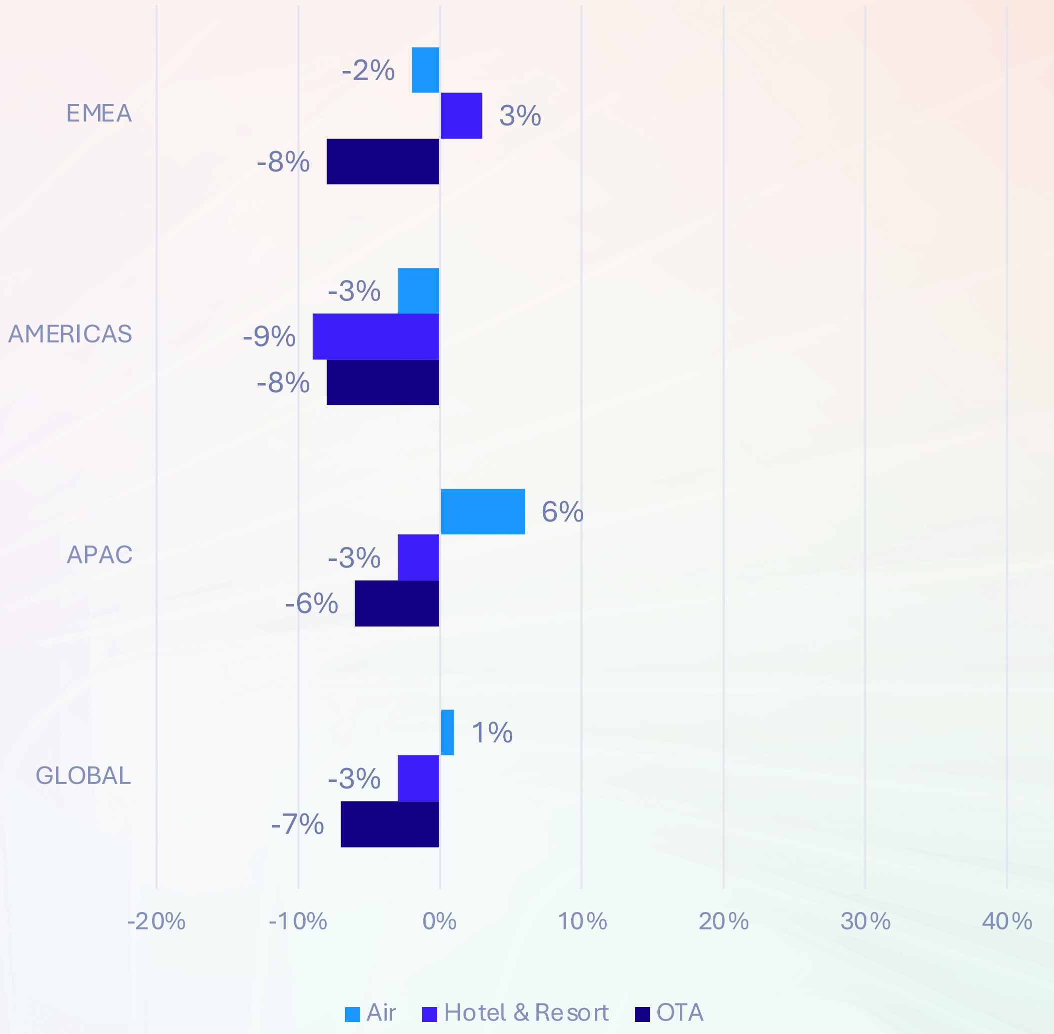


Source: Organic Criteo Data. Year-on-Year Online Traffic by region – January to March 2025 and 2026.

Conversion softens across travel categories, with air more resilient

Conversion rates declined across most travel categories and regions in Q1 2026, with OTAs seeing the steepest drop (down of 12% in the Americas and -10% in APAC). Hotel followed a similar trend to OTAs.

Air remained more resilient, with slight gains globally and stronger performance in APAC.

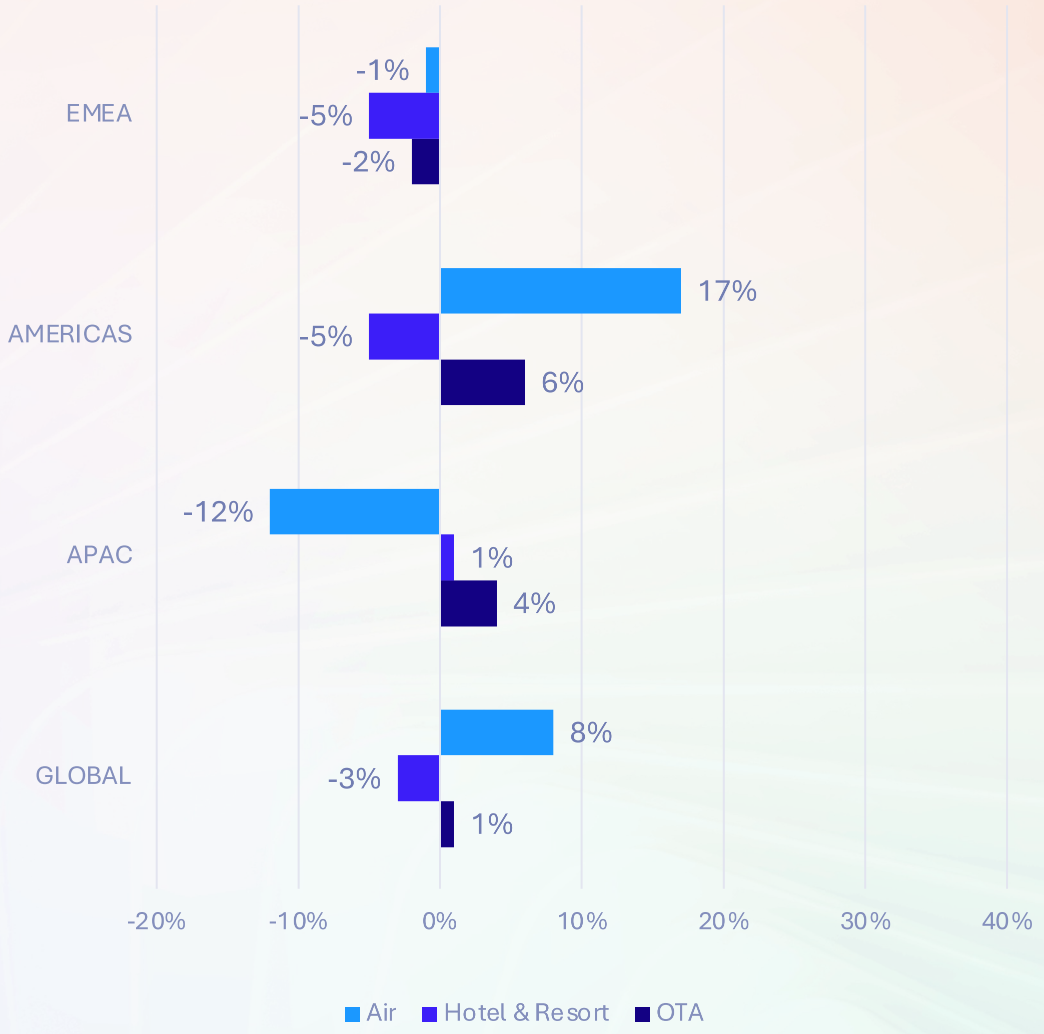


Source: Organic Criteo Data. Year-on-Year Online Conversion Rate by region – January to March 2025 and 2026.

Travel demand is growing, led by air in the Americas

In Q1 2026, air bookings increased +8% globally, driven by strong growth in the Americas (+17%). In contrast, APAC saw declines (-12%), while EMEA remained slightly negative.

Hotel and OTA bookings showed more limited and uneven growth across regions, reinforcing the concentration of demand in air and continued reliance on key markets to drive overall performance.

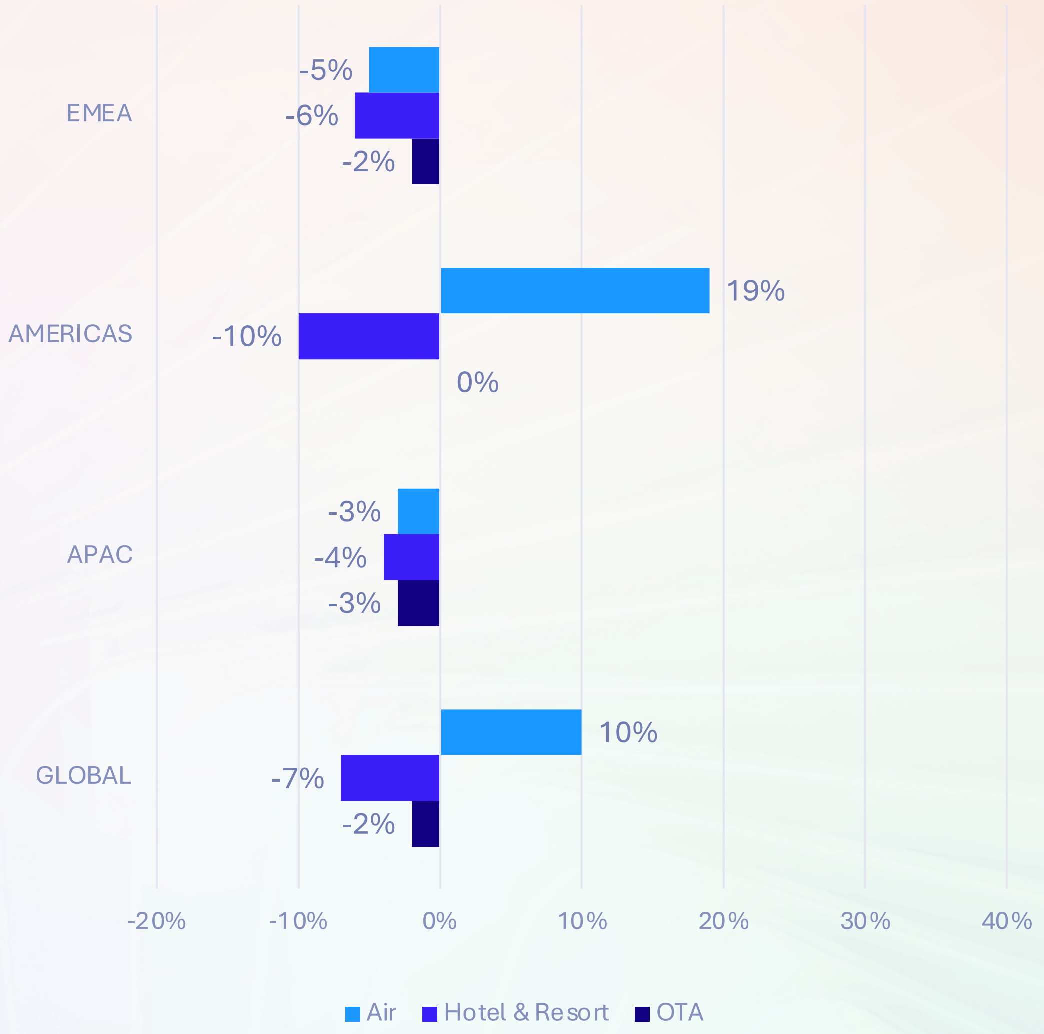


Source: Organic Criteo Data. Year-on-Year Online Bookings by region – January to March 2025 and 2026.

Travel revenue is rising, but unevenly across categories

Global travel revenue increased +10% YoY in Q1 2026, led by strong air performance in the Americas (+19%). In contrast, EMEA and APAC declined across most segments, pointing to uneven regional demand.

Hotel and OTA revenues are underperforming globally, reinforcing the concentration of revenue growth in air.

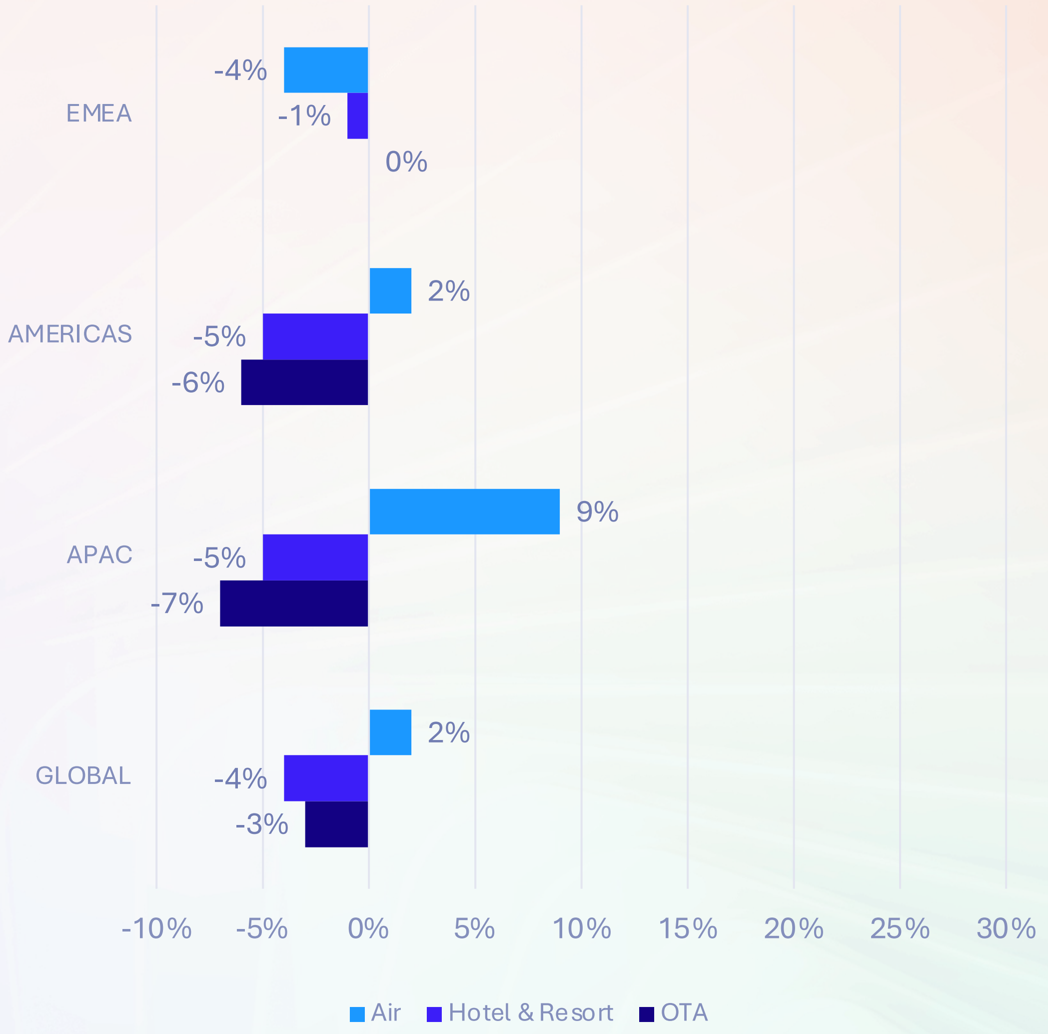


Source: Organic Criteo Data. Year-on-Year Online Revenue by region – January to March 2025 and 2026.

Spending per trip remains stable despite shifting demand

In Q1 2026, global average order value remains relatively stable, with most segments remaining flat or negative.

Air stands out with growth across regions, particularly in APAC (+9%), while hotel and OTA AOVs decline in most markets, especially in the Americas and APAC.



Source: Organic Criteo Data. Year-on-Year Online Average Order Value by region – January to March 2025 and 2026.

AIR - GLOBAL

Travelers continue to show strong interest in air travel but booking behavior varies

Global air traffic shows consistent growth throughout the period, reaching a peak of over +20% YoY in later weeks.

Bookings, however, are more volatile, with fluctuations and declines in several weeks toward the end of the period. This divergence suggests sustained demand, but inconsistent conversion into bookings.

Source: Organic Criteo Data. Weekly Year-on-Year Online Air Traffic and Bookings, Global – Week 8-15 (Feb 17-Apr 13) 2025 vs 2026.

In the Americas, air demand is outpacing bookings

Air travel in the Americas shows sustained growth, with traffic consistently rising and reaching mid-20% YoY growth in the later weeks.

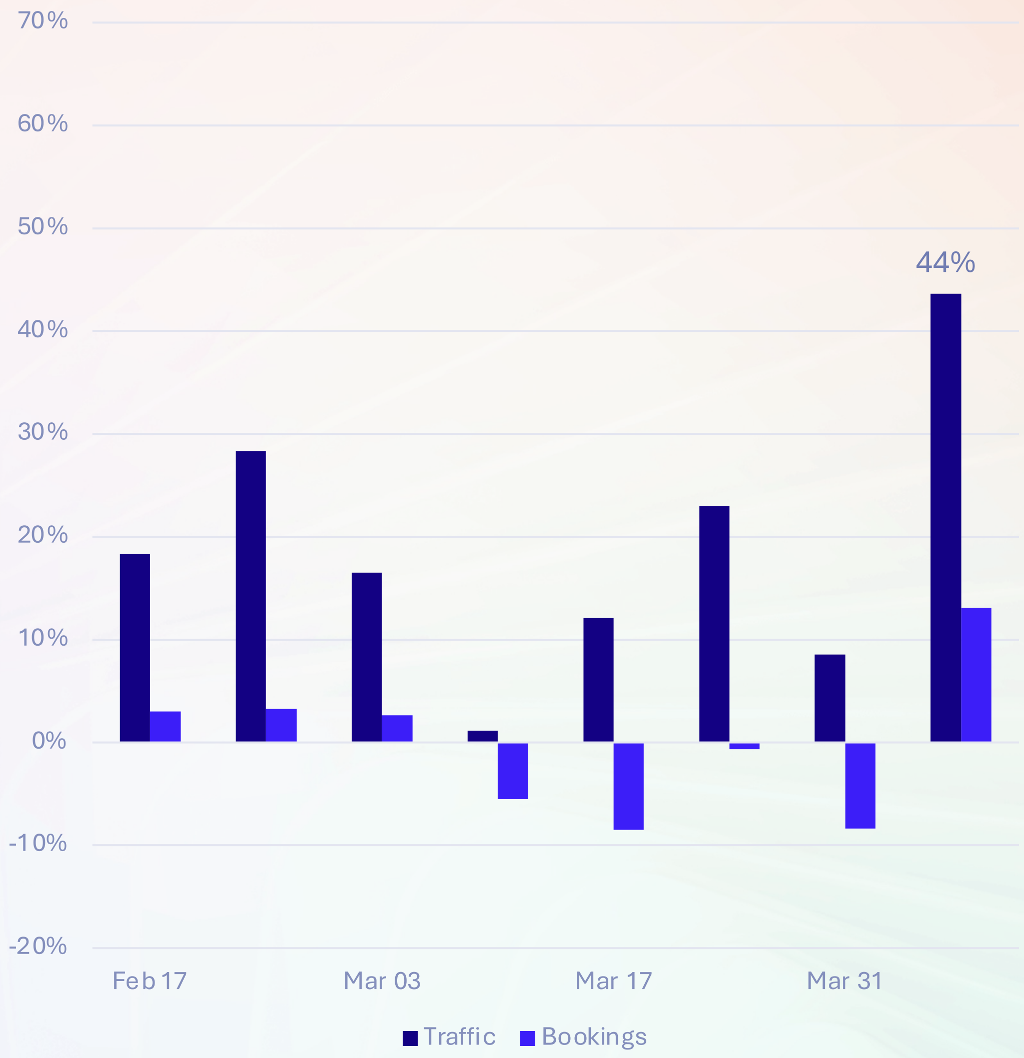
In contrast, bookings trend lower over the same period, with growth moderating and becoming more variable, pointing to a widening gap between traveler interest and completed bookings.

Source: Organic Criteo Data. Weekly Year-on-Year Online Air Traffic and Bookings, AMERICAS – Week 8-15 (Feb 17-Apr 13) 2025 vs 2026.

In EMEA, air demand is rising but not translating to bookings

Air traffic in EMEA shows strong growth, with a peak exceeding +40% YoY in later weeks.

However, bookings remain inconsistent, with several weeks dipping into negative levels, highlighting a persistent gap between rising interest and completed bookings.

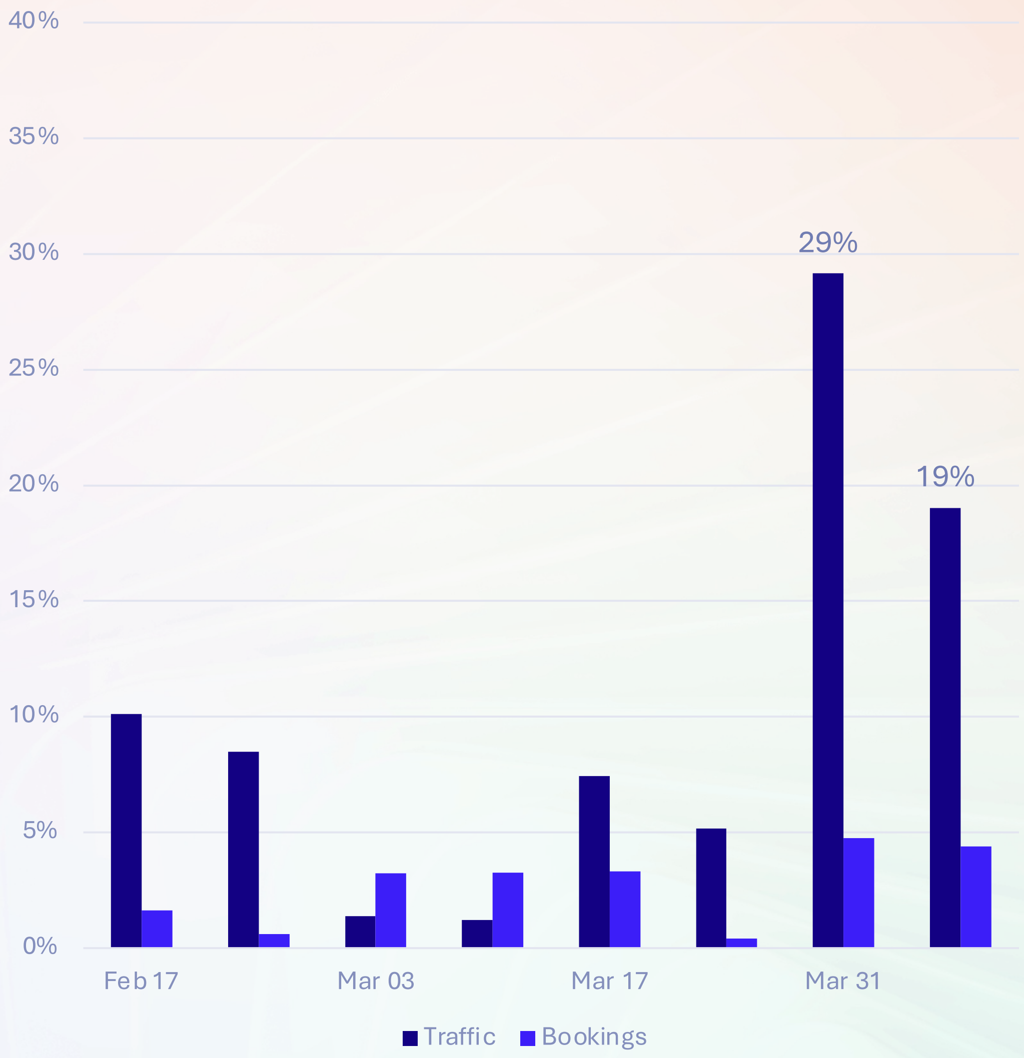


Source: Organic Criteo Data. Weekly Year-on-Year Online Air Traffic and Bookings, EMEA – Week 8-15 (Feb 17-Apr 13) 2025 vs 2026.

In APAC, hotel demand strengthens but conversion remains modest

Hotel traffic in APAC increases over the period, with a late spike nearing +30% YoY.

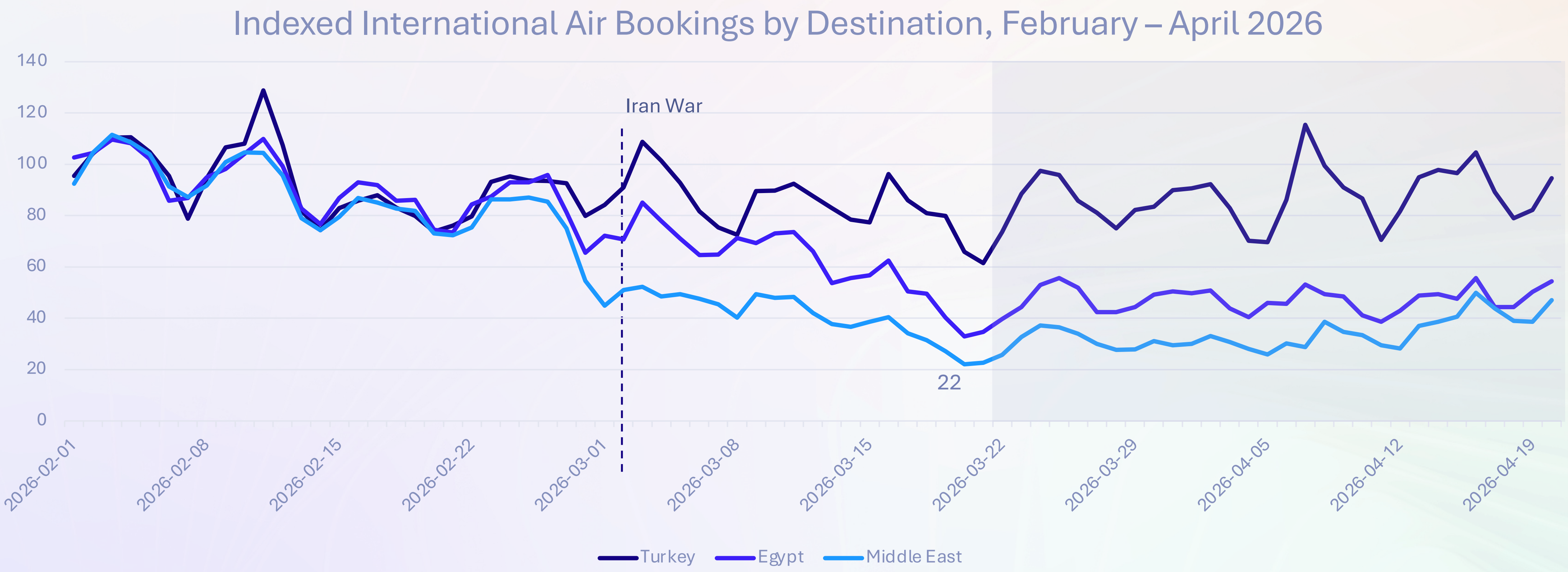
In contrast, bookings remain low and inconsistent, with only modest gains and periodic declines, suggesting continued friction between demand and conversion.



Source: Organic Criteo Data. Weekly Year-on-Year Online Hotel Traffic and Bookings, APAC – Week 8-15 (Feb 17-Apr 13) 2025 vs 2026.

Geopolitical disruption sharply impacts Middle East travel

Geopolitical tensions triggered a sharp decline in air travel to the Middle East, with bookings dropping as much as 78% versus early February levels. While nearby markets like Turkey remain more resilient, demand overall has yet to fully recover—highlighting uneven regional impact and continued sensitivity to disruption.

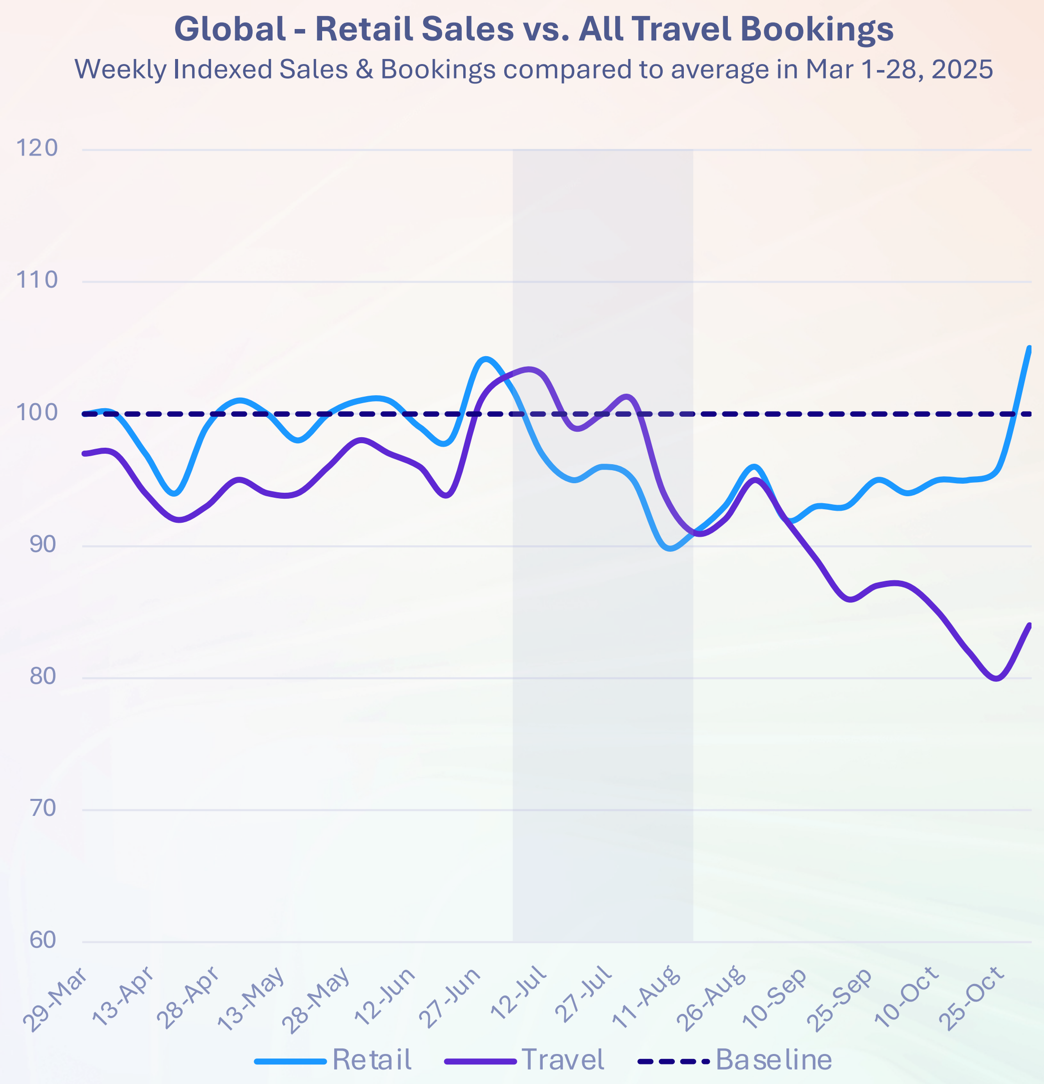


Organic Criteo Data. Indexed daily bookings of international flights to Turkey, Egypt, and Middle East. Baseline: Average in Feb 1-7, 2026.

Travel outperforms retail during peak summer

From early July to mid-August, travel bookings outpaced retail sales by 4 index points on average.

This period marks a clear seasonal shift as consumer demand pivots towards last minute travel during peak summer.

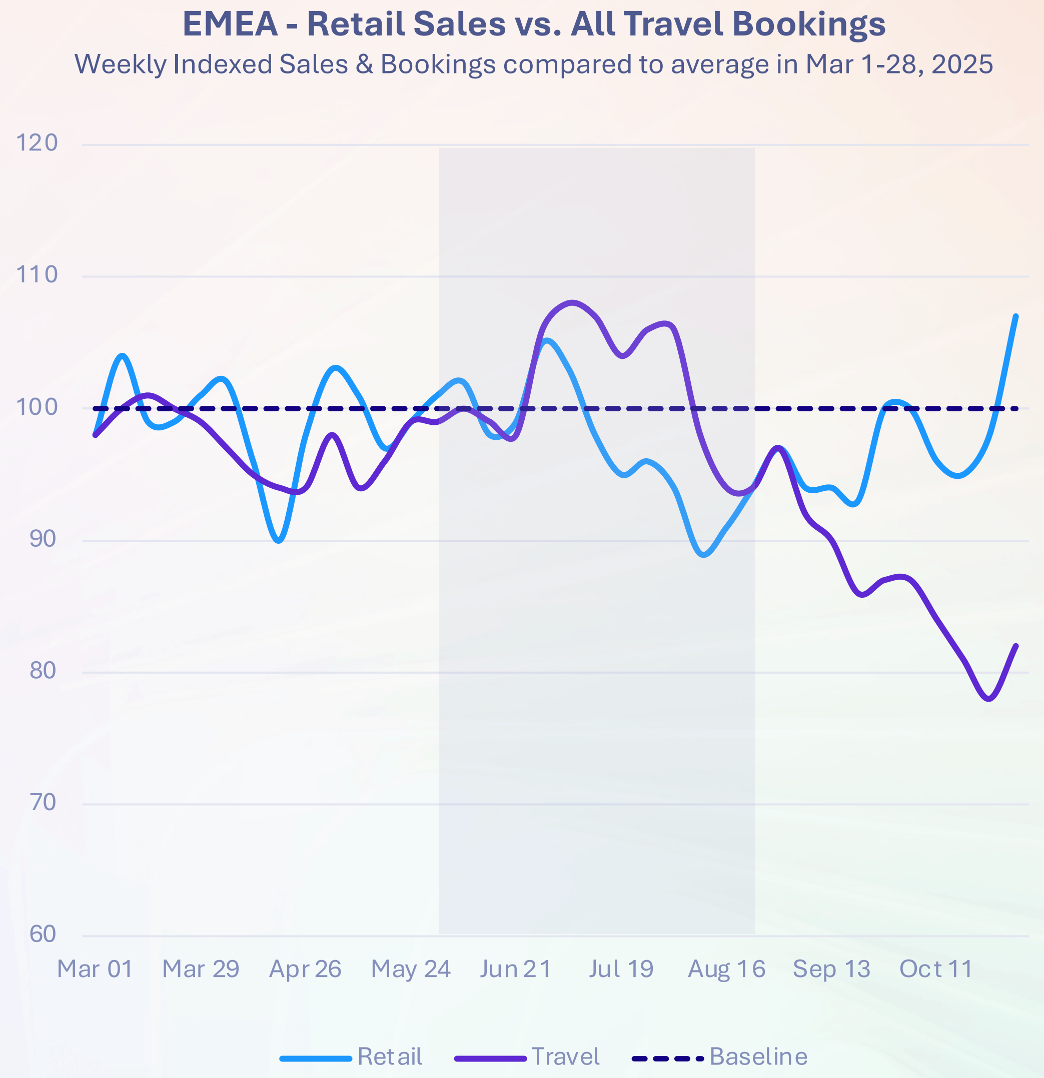


Source: Organic Criteo Data. Weekly Retail Sales & Travel Bookings indexed to Mar 1-28, 2025. Global Retailers & Travel Providers with stable data during Mar 1-Nov 7, 2025. Verticals are independent, and this is not representative of relative value/volume.

In EMEA, travel leads during peak summer

Travel bookings in EMEA outpaced retail for over two months, by 6 index points on average.

This sustained lead reflects strong seasonal demand, with travel maintaining an advantage during peak weeks before converging with retail later in the period.

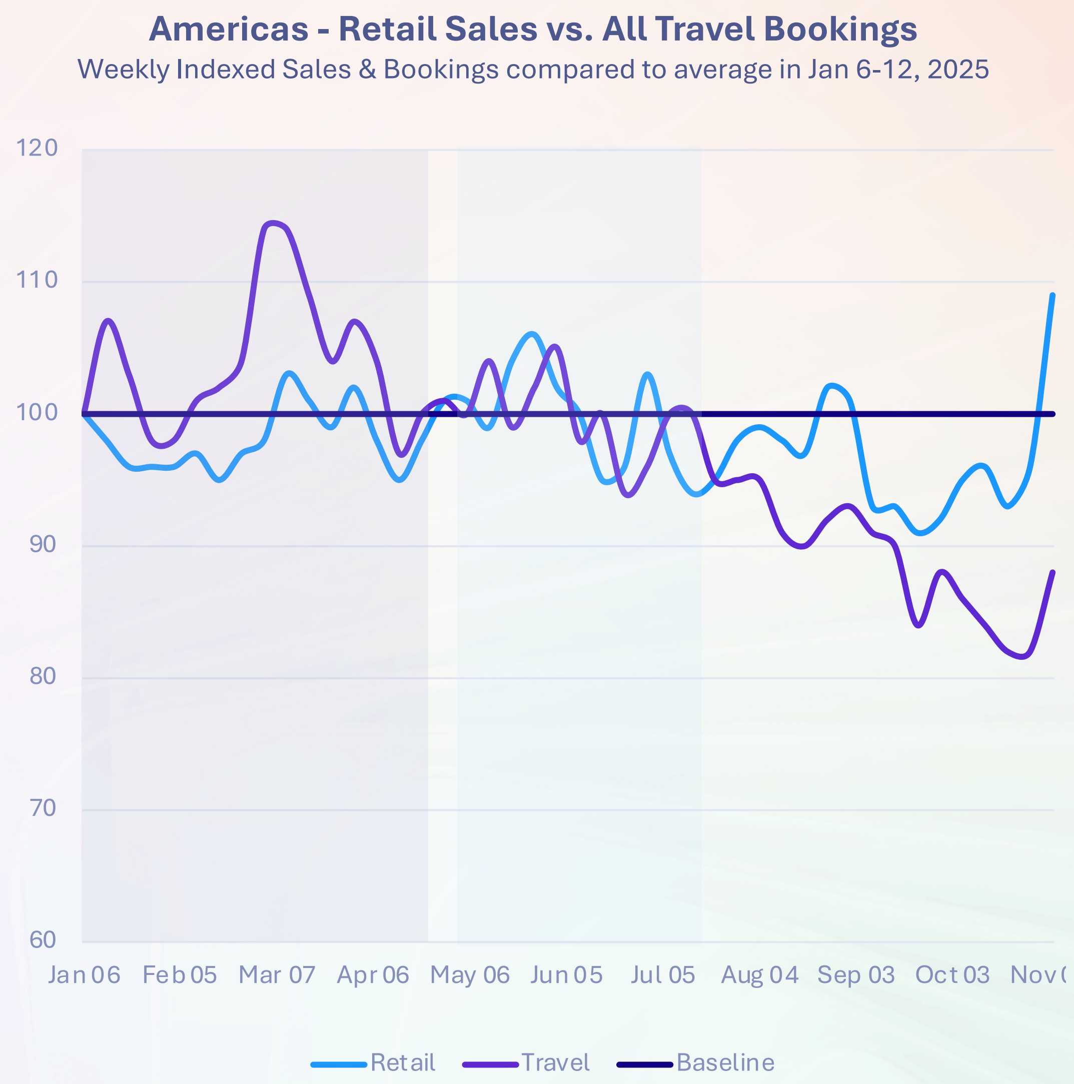


Source: Organic Criteo Data. Weekly Retail Sales & Travel Bookings indexed to Apr 1-28, 2025. EMEA Retailers & Travel Providers with stable data during Mar 1-Nov 1, 2025. Verticals are independent, and this is not representative of relative value/volume.

In the Americas, travel starts strong but softens over time

Travel bookings in the Americas outpaced retail early in the year, with stronger performance through Q1 and early Q2.

From late spring onward, the gap narrows as both categories track more closely, before travel softens relative to retail in the later months.

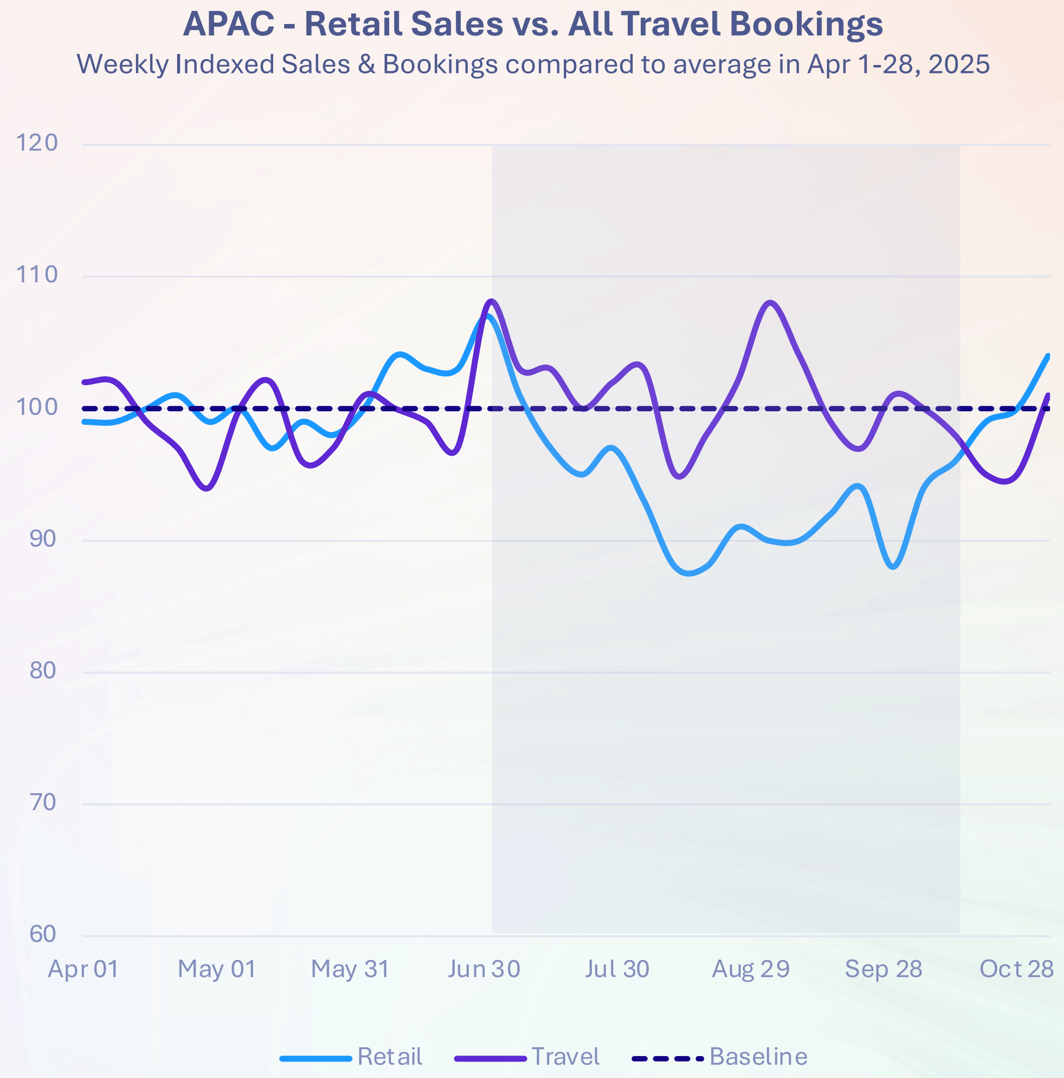


Source: Organic Criteo Data. Weekly Retail Sales & Travel Bookings indexed to Jan 6-12, 2025. Americas Retailers & Travel Providers with stable data during Jan 6 – Nov 3, 2025. Verticals are independent, and this is not representative of relative value/volume.

In APAC, travel maintains a longer seasonal lead

Travel bookings in APAC outpaced retail from early July through mid-October, by an average of 8 index points.

This extended period of outperformance highlights a longer travel season, with demand remaining elevated well into late Q3 before gradually normalizing.



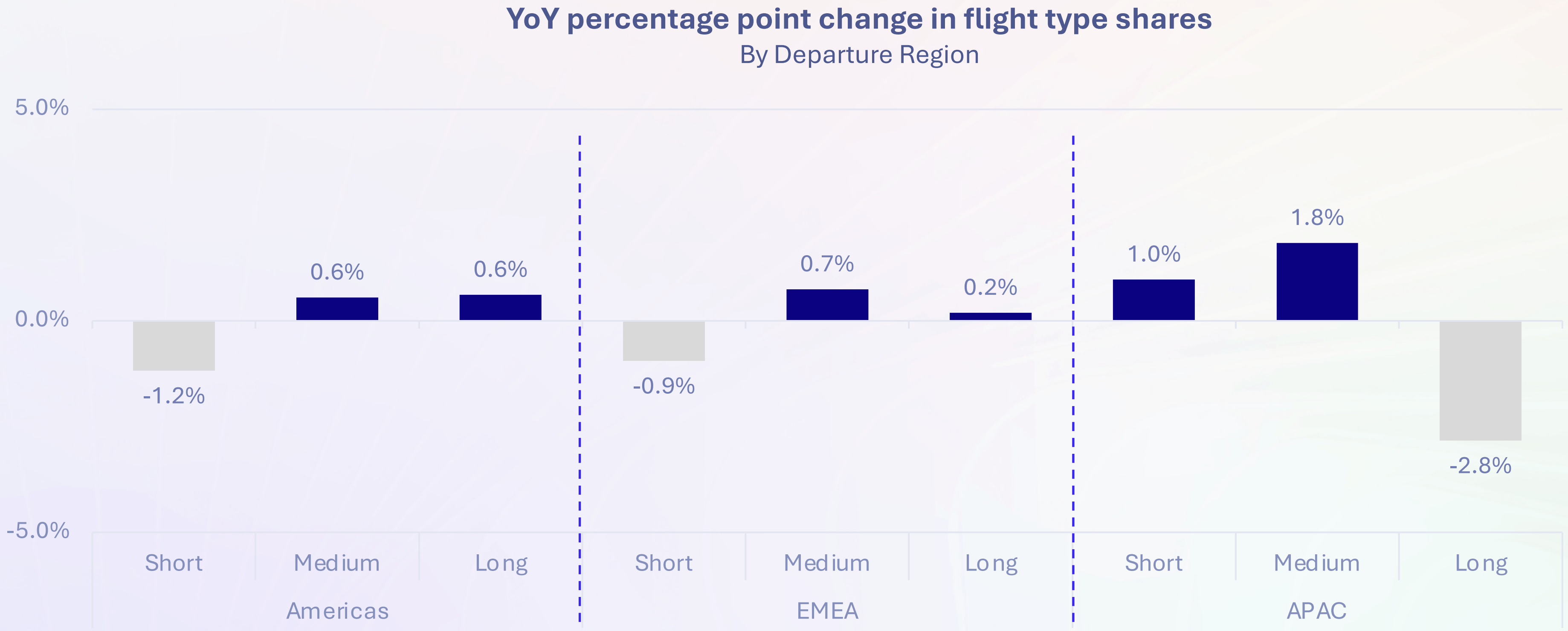
Source: Organic Criteo Data. Weekly Retail Sales & Travel Bookings indexed to Apr 1-28, 2025. APAC Retailers & Travel Providers with stable data during Apr 1-Nov 10, 2025. Verticals are independent, and this is not representative of relative value/volume.

02

Booking Behavioral Shifts

Travel shifts towards mid-distance trips globally

Across all domestic and international flights, medium-haul travel is rising across regions. Long-haul travel declines most notably in APAC (-2.8 pts), while short-haul trends vary, indicating a broader shift away from long-distance travel rather than toward a single flight type.



Flight length is defined as:

- **Short-haul:** <750 nautical miles
- **Medium-haul:** 750–2,500 nautical miles
- **Long-haul:** >2,500 nautical miles

Source: Organic Criteo Data. Flight data pulled from all bookings completed Apr 1-14 in both 2025 and 2026, across the same set of Air Travel partners with consistent data in both years.

Trips are moving closer to home among APAC travelers

International travel share declines in APAC (-4.7 pts) and slightly in the Americas (-0.5 pts), while EMEA increases (+1.4 pts) year-over-year.

This suggests a shift toward more domestic and regional travel in some regions, rather than a uniform global trend.

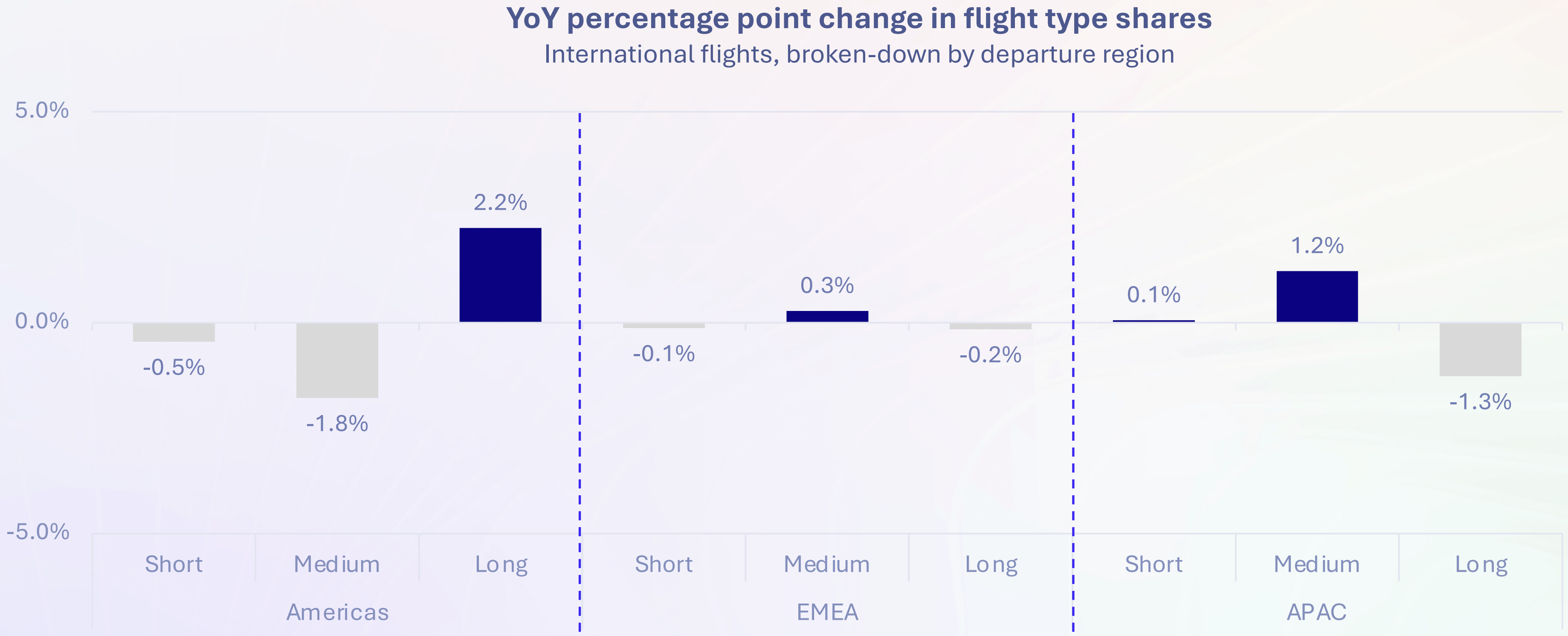
YoY percentage point change in share of international flights

+1.4%	EMEA
-0.5%	Americas
-4.7%	APAC

Source: Organic Criteo Data. Flight data pulled from bookings completed Apr 1-14 in both 2025 and 2026, across the same set of Air Travel partners with consistent data in both years.

International travel distances diverge by regions

Within international travel, distance preferences diverge by region. The Americas shift toward long-haul trips (+2.2 pts), while APAC shifts toward mid-haul (+1.2 pts) as long-haul declines (-1.3 pts), and EMEA remains stable.



Flight length is defined as:

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Source: Organic Criteo Data. Flight data pulled from international bookings completed Apr 1-14 in both 2025 and 2026, across the same set of Air Travel partners with consistent data in both years.

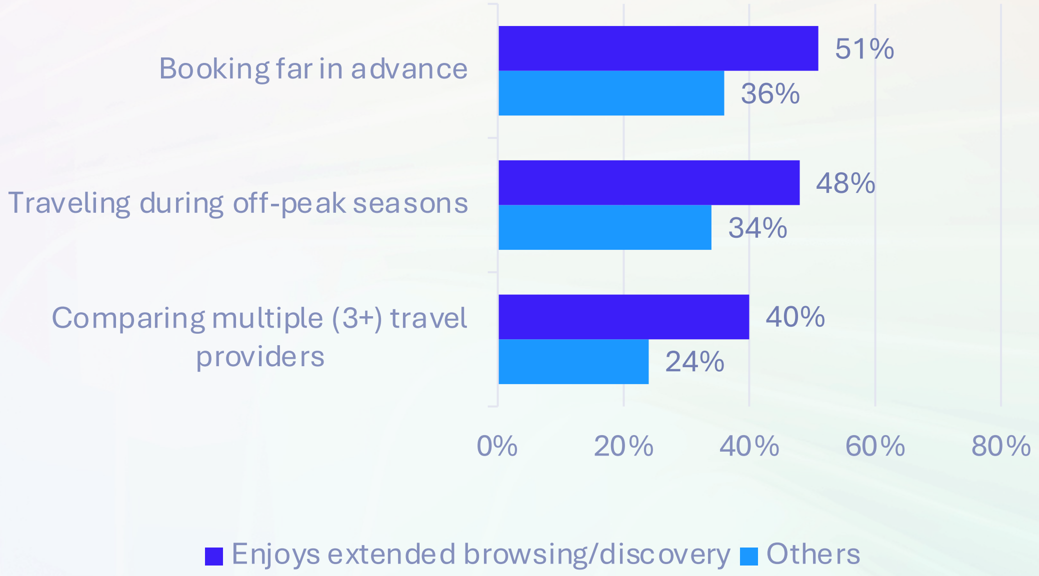
Travelers who browse more plan smarter

Globally, 42% of travelers enjoy extended browsing when planning trips. This group plans with intent—booking earlier, traveling off-peak, and comparing providers—reflecting a more deliberate and optimized approach to travel decisions.

Share of Respondents Who Enjoy a Longer Browsing and Discovery Process for Travel & Experiences

42%

Share of Respondents Using Cost Optimization Methods, by Browsing Preference for Travel & Experiences

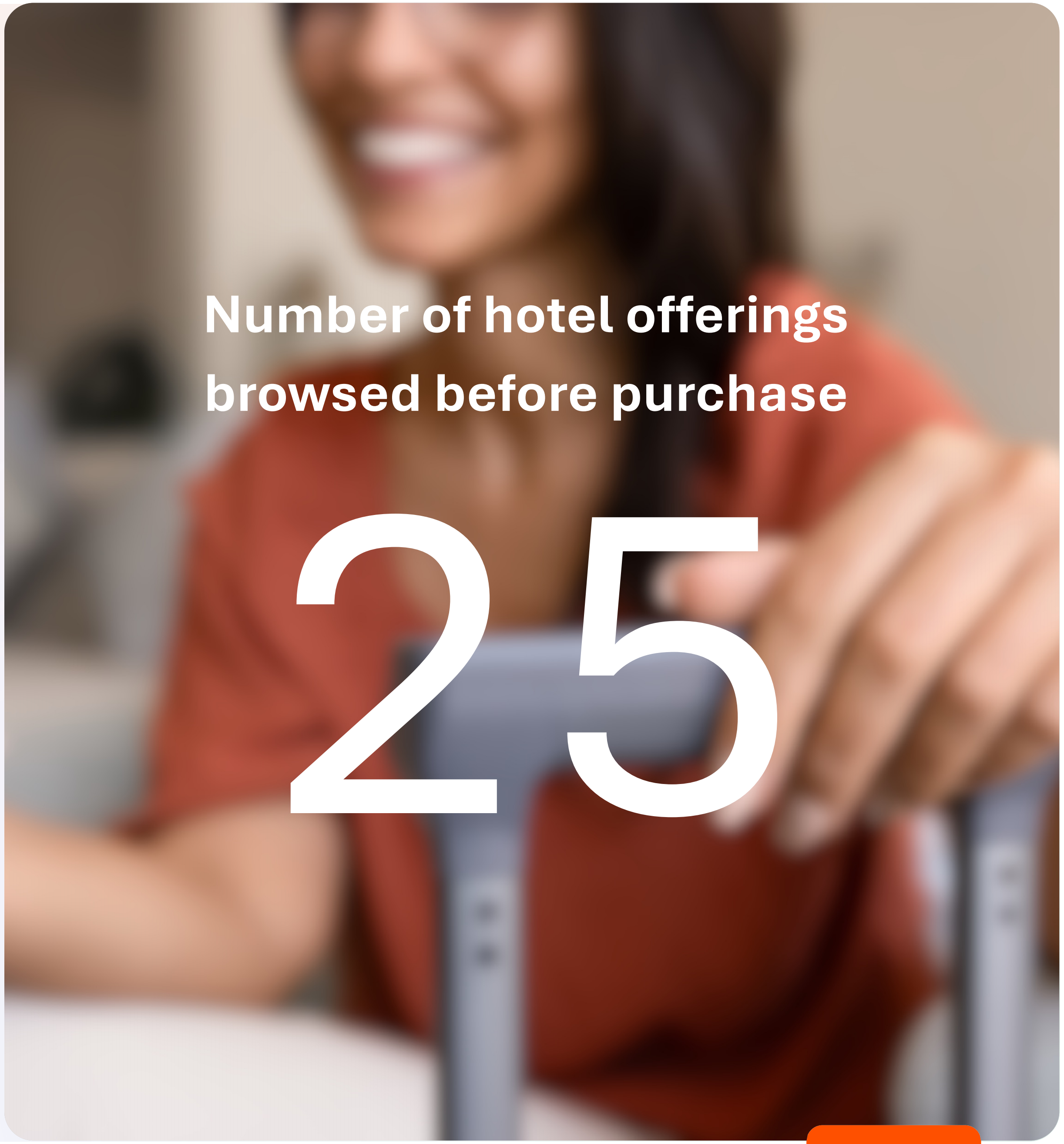


Source: Criteo Survey – Consumer Travel Preferences, February 2026. Global. N=6,379

Travelers compare more hotels before they commit

Travelers evaluate a wide range of options before booking, browsing an average of 25 hotel listings prior to purchase.

This sustained evaluation highlights a highly competitive landscape, where multiple interactions influence the final decision and conversion is rarely immediate.



Source: Organic Criteo Data. Bookings from March 18-31, 2026; measuring number of product offerings browsed on item and listing pages; browsing window spanning Jan 1 – Mar 31, 2026 for visitors who completed a booking. Global Hotel & Resort Travel Partners.

Booking journeys are short on average, but highly variable

Travel booking windows remain relatively short on average, at 9.5 days for flights and 11.5 days for hotels.

However, timelines vary widely. While some users convert within minutes, others take over a month, highlighting a compressed but highly fragmented path to purchase.

Source: Organic Criteo Data. Bookings from Mar 18-31, 2026; measuring time from first product description page view until booking completed for new visitors; browsing window spanning from Dec 31, 2025 until the booking date of each visitor. Global Air and Hotel & Resort Travel Partners.

Longer trips require longer planning horizons

Booking lead times increase significantly with trip length.

Trips of 8+ nights are planned 86 days in advance on average, nearly three times longer than single-night stays (29 days) with mid-length trips falling in between.

Days booked in advance by buckets of stay length

Source: Organic Criteo Data. Flight, hotel and tour packages bookings during Apr 1-14, 2026. Global.

Booking windows are tightening across trip types

Booking lead times remain relatively extended, particularly for longer trips, but are declining year over year across all stay lengths.

In early April 2026, the average lead time fell to 52.7 days (-7% YoY), with consistent declines across trip types. Even longer stays (8+ nights), which have the longest planning windows, saw lead times drop to 85.5 days (-6% YoY).

Average Booking Anticipation Time, April 1-14, 2026 vs. 2025

	2025	2026	YoY change
Average	56.6 days	52.7 days	-7%
1 night	29.6 days	28.5 days	-4%
2-3 nights	48.6 days	46.7 days	-4%
4-7 nights	71.1 days	66.4 days	-7%
8+ nights	91.2 days	85.5 days	-6%

Source: Organic Criteo Data. Flight, hotel and tour packages bookings during Apr 1-14, 2026. Global.

Travel stands out as a high-discovery category

Travel drives deeper discovery than most categories, with 42% of consumers globally engaging in extended browsing—on par with fashion. This makes discovery a critical stage for influencing travel decisions. However, engagement varies by market, with particularly strong discovery behavior in France (52%) and Germany (46%).

In which categories do you actively enjoy a longer browsing/discovery process? (Select all that apply)

	GLOBAL	United States	United Kingdom	France	Germany	Japan	South Korea
Electronics	43%	47%	47%	47%	47%	20%	47%
Fashion	42%	47%	48%	35%	36%	43%	44%
Travel / Experiences	42%	37%	41%	52%	46%	36%	39%
Beauty / Personal Care	33%	39%	40%	27%	27%	28%	37%
Groceries / Household Items	30%	41%	31%	9%	20%	34%	47%
Home Décor / Furniture	30%	35%	35%	35%	35%	19%	21%
Health / Wellness	25%	30%	24%	27%	22%	19%	29%
None—give me efficiency over discovery	9%	7%	7%	11%	11%	15%	4%

Source: Criteo Shopper Survey, 2026Q1 (N=6379).

AI is expanding its role across the travel journey

AI usage now spans the full travel journey, led by discovery use cases such as activities (41%), destination ideas (40%), and accommodation planning (40%). At the same time, travelers are increasingly using AI for more complex tasks, including full trip planning (30%) and in-trip decisions such as dining (37%), indicating growing confidence in end-to-end support. This trend is most pronounced in APAC, where holistic planning usage is highest.

In what travel planning situations would you find an artificially intelligent chat app or website useful? Select all that apply.

	Global	US	UK	FR	DE	JP	KR
Activities / Excursions / Sightseeing	41%	44%	44%	42%	40%	33%	43%
Destination ideas	40%	45%	44%	41%	27%	48%	38%
Accommodation Suggestions	40%	39%	44%	40%	41%	38%	40%
Dining Experiences	37%	39%	28%	35%	35%	39%	44%
Holistic / Full Trip Planning	30%	22%	20%	29%	21%	45%	47%
Air Travel	27%	33%	30%	28%	32%	14%	24%
Car Rental / Ground Transportation options	22%	32%	23%	21%	19%	19%	21%
Other	5%	8%	8%	4%	8%	4%	1%

Source: Criteo Survey – Consumer Travel Preferences, February 2026 (N=6379), Global.

AI is influencing booking outcomes

AI is becoming a high-impact channel in the travel path to purchase. In March 2026, ChatGPT drove a higher share of product page landings than search (+13 pp), indicating strong influence at the discovery and consideration stages. This engagement is increasingly translating into transactions, with 72% of Criteo travel clients recording at least one ChatGPT-referred booking.

Share of Product Page Landings Referred by ChatGPT vs. Search

+13pp

Share of Criteo Travel Partners with at least 1 ChatGPT-referred Transaction

72%

Source: Criteo Data, Global Travel clients with consistent ad spend since November 2025.

Trust and flexibility drive decisions

Good reviews are the top decision driver globally (66%), reinforcing the importance of trust when comparing travel providers. Free cancellation (48%) and special offers (45%) follow, highlighting the continued need for flexibility and value. While refundability (38%) and recommendations (30%) play a secondary role, loyalty programs and sustainability considerations remain lower priorities overall. Regional differences show stronger emphasis on reviews in the UK and Korea, and higher importance of flexibility in European markets.

What are the most important factors for you when comparing travel providers? Select all that apply.

	Global	US	UK	FR	DE	JP	KR
Good reviews	66%	66%	70%	58%	65%	65%	72%
Free cancellation	48%	45%	47%	57%	57%	46%	38%
Special offer	45%	46%	54%	50%	49%	27%	43%
Easily refundable services	38%	46%	44%	39%	32%	24%	42%
Friends or relatives recommendations	30%	33%	37%	29%	34%	23%	26%
Loyalty programs	25%	40%	30%	24%	20%	17%	22%
Eco–friendly / Sustainable travel options	16%	21%	21%	13%	16%	6%	21%
Other	2%	2%	3%	3%	3%	3%	1%

Source: Criteo Survey – Consumer Travel Preferences, February 2026. Global. N=6,379.

03

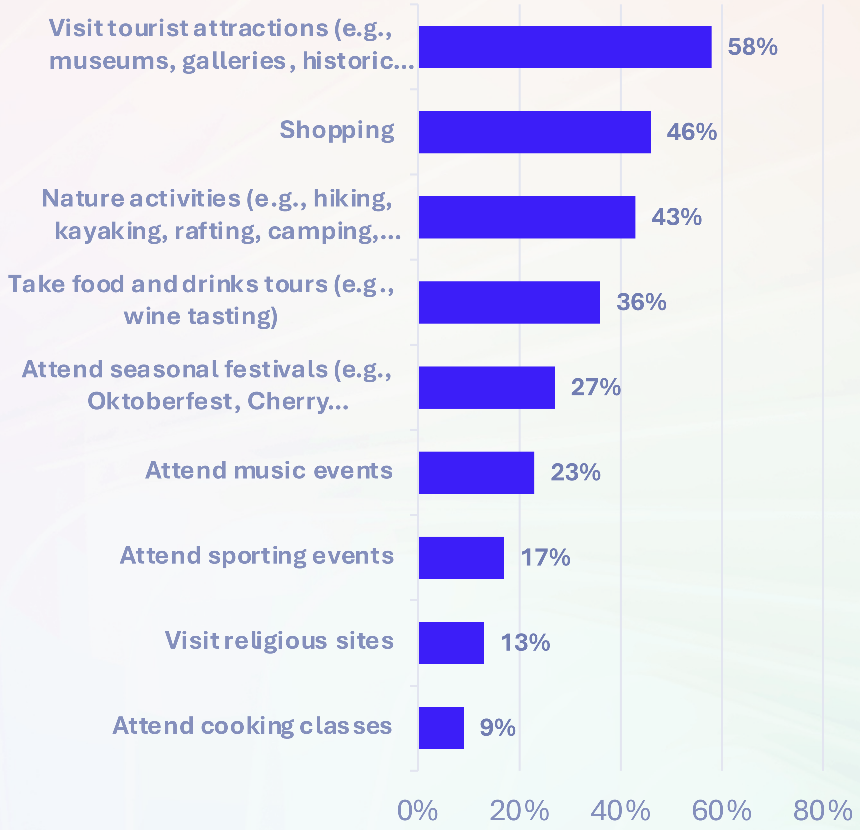
Today's Traveler

Trips start with one intent, but quickly expand

Travelers often begin planning around a primary interest, with iconic attractions leading (58%). However, intent quickly expands, with strong interest in shopping (46%), nature (43%), and food experiences (36%).

This shows that trips are rarely single-purpose, creating opportunities to engage travelers across multiple moments in their journey.

Share of respondents who selected the listed category when responding to the question, "Which of the following are you most interested in participating in during your next vacation? (Select all that apply)."

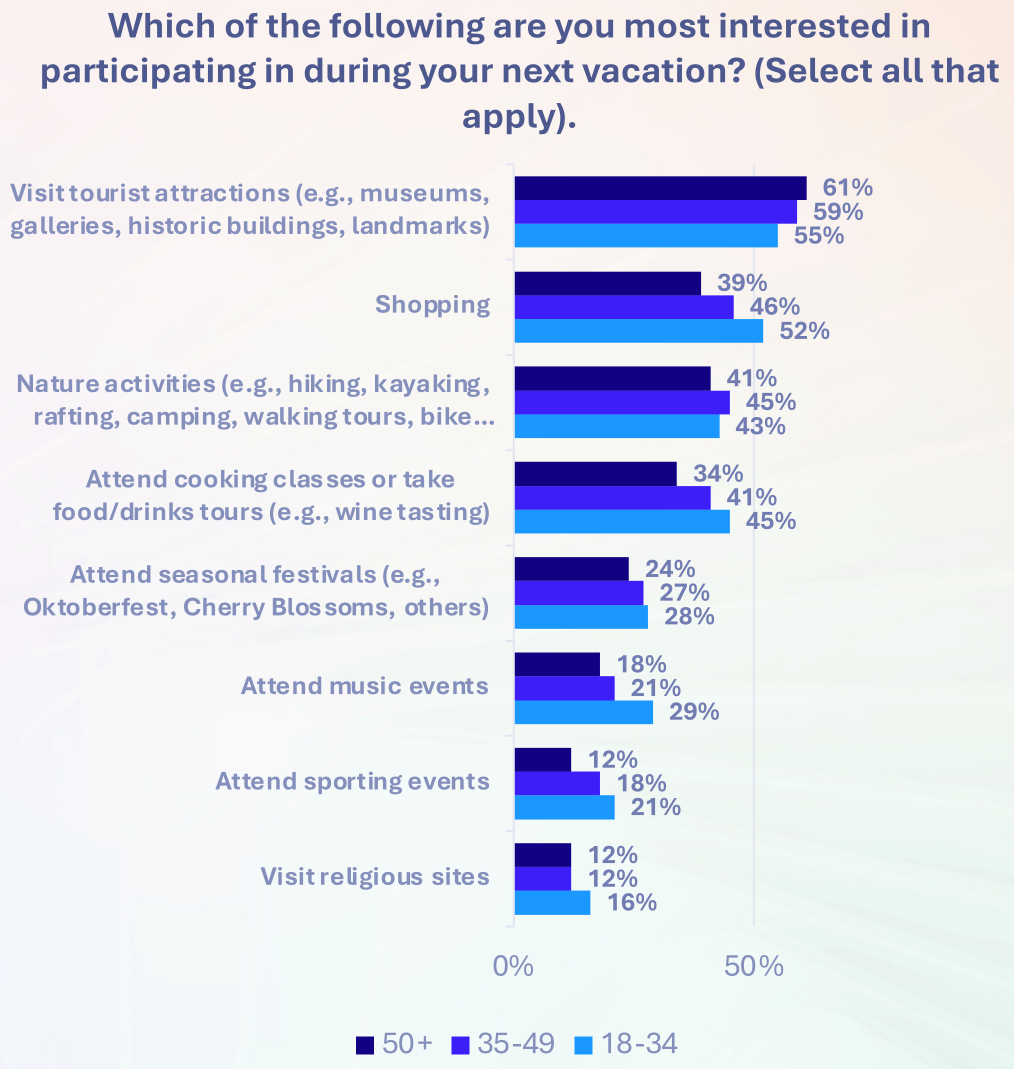


Source: Criteo Survey – Consumer Travel Preferences, February 2026, Global. N=6,379.

Generational differences reshape how travelers spend their time

While tourist attractions remain a universal starting point for all ages, travel preferences diverge by age. Older travelers lean toward cultural and landmark-driven trips, while younger audiences over-index on shopping, food, and social experiences.

Nature stands out as a consistent cross-generational interest.



Source: Criteo Survey – Consumer Travel Preferences, February 2026, Global (US, UK, FR, DE, JP, KR). N=6,379

Sports travel drives fuller itineraries beyond the main event

Sports event attendees are more engaged across a range of activities compared to the other travelers. They are 26% more likely to attend seasonal festivals, 19% more likely to go on food and drink tours, and 12% more likely to shop during their trips.

This suggests that sports-driven travel often extends beyond the event itself, with travelers building broader leisure and cultural experiences around their trip.

Indexed Likelihood of Attending the Following Activities During Their Next Vacation, Sports Events Attenders vs. Others

Source: Criteo Survey – Consumer Travel Preferences, February 2026, Countries: US, UK, FR, DE, JP, KR. N=6,379. Cohort created using respondents who selected "Attending sporting events" for the question "Which of the following are you most interested in participating in during your next vacation? (Select all that apply)."

Cooler destinations attract higher-spending US travelers

Peak-summer heat drives increased demand for cooler destinations. In July, travelers departing from warm US markets such as Las Vegas are 17% more likely to choose cooler destinations like Seattle compared to in October.

At the same time, airfares on comparable warm-to-cooler routes are 16% higher on average, indicating resilient, higher-value demand for cooler getaways during the hottest months.

Likelihood of choosing a colder destination in Jul vs. in Oct

+17%

Price trend

+16%

Source: Organic Criteo Data. Purchase data from air bookers during Oct 1-7, 2025 and Jul 1-7 2025, US.

THE PREMIUM TRAVELER

Choosing cooler destinations signals higher-value travel

Travelers opting for cooler destinations exhibit a clear premium profile. These travelers venture farther and spend more on flights compared to those who choose warm locations.

These behaviors suggest that demand for alternative, less typical summer destinations translates into stronger monetization potential.

Source: Organic Criteo Data. Air bookers during July 1–7, 2025. Heat escapers defined as travelers booking trips to cooler destinations from warm-origin locations; heat stayers defined as travelers booking trips to warm destinations.

HEAT ESCAPERS VS. HEAT STAYERS

Heat Escapers

Travel 1.3x farther

Spend 1.4x more

THE PREMIUM TRAVELER

Niche destinations drive higher spend and longer trips

Travelers visiting niche destinations show a significantly higher-value profile than those choosing mainstream locations. They travel longer distances and allocate more budget to flights, reinforcing the link between destination exclusivity and higher-value travel behavior.

Source: Organic Criteo Data. Air bookers during July 1–7, 2025. Niche destinations defined as destinations outside the top 20% most visited locations; mainstream destinations represent the top 20% where most travelers concentrate.

NICHE DESTINATION TRAVELERS
VS.
MAINSTREAM DESTINATION TRAVELERS

Niche Travelers

Travel 1.7x farther

Spend 1.6x more

Premium travel demand translates into stronger retail spending

Premium travelers don't just spend more on travel, they also demonstrate significantly higher purchase intent across retail categories. Travelers heading to hotspot destinations are more likely to purchase premium goods, with uplift reaching +48% in perfume and cologne, +44% in handbags, and +41% in vitamins and supplements.

% Change in purchase likelihood across personas

	Handbags	Jewelry	Perfume & Cologne	Vitamins & Supplements	Golf
Niche vs. Hotspot Destination Travelers	+44%	+26%	+48%	+41%	+24%

Source: Organic Criteo Data. July 2025 purchase data from air bookers who made an air booking during Jul 1-7, 2025, US. Hotspot destinations are top 20% of destinations where 90% of travelers visit.

THE FAMILY TRAVELER

Families travel farther and spend more

Parent travelers consistently take larger, higher-value trips than non-parents. During the July 1–7, 2025 period, they traveled 8% farther on average and spent 6% more on flights, signaling stronger intent and a more premium travel profile.

This pattern highlights family travelers as a high-value audience, particularly for longer, higher-consideration trips.

Source: Organic Criteo Data. Purchase data from air bookers during Oct 1-7, 2025 and Jul 1-7 2025, US.

Distance
Parents vs. Non-Parents
+17%

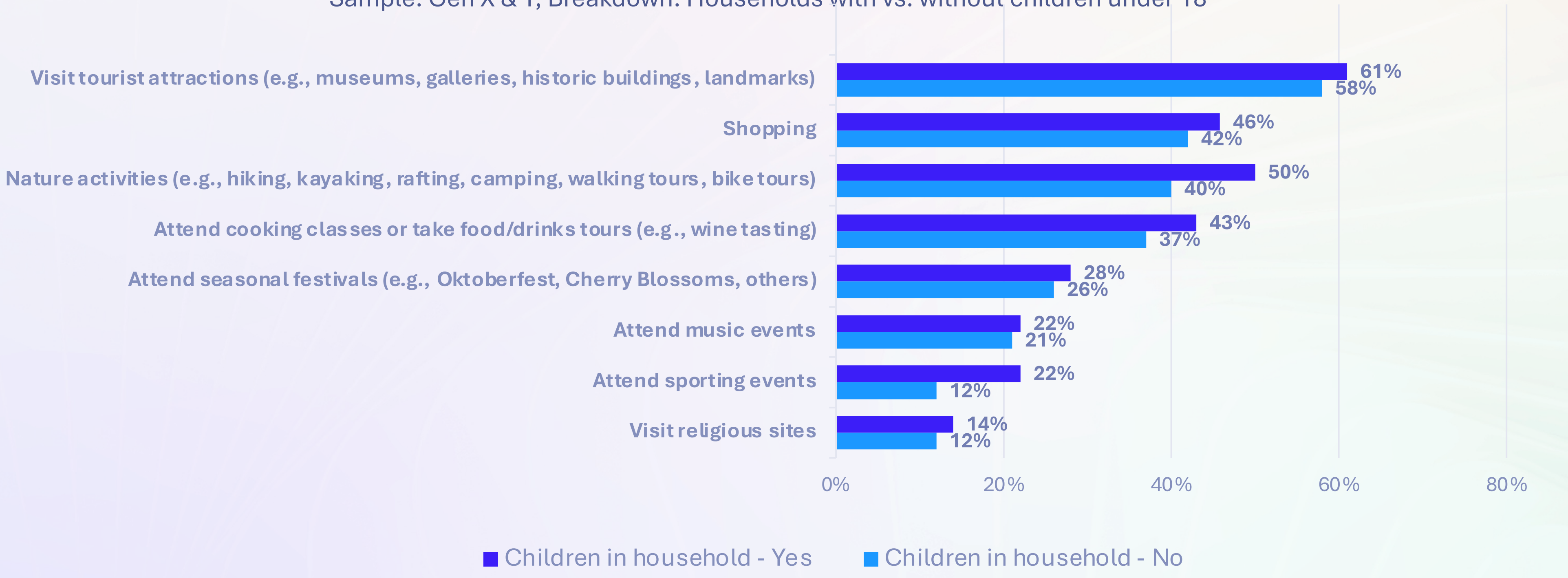
Flight spend
Parents vs. Non-Parents
+16%

Trips with children tend to include a broader mix of activities

Families are more likely to build fuller, diverse itineraries. Travelers with children show consistently higher interest across activities, especially nature activities (50%), food experiences (43%), and sporting events (22%).

Share of respondents who selected the listed category when responding to the question, "Which of the following are you most interested in participating in during your next vacation? (Select all that apply)."

Sample: Gen X & Y; Breakdown: Households with vs. without children under 18



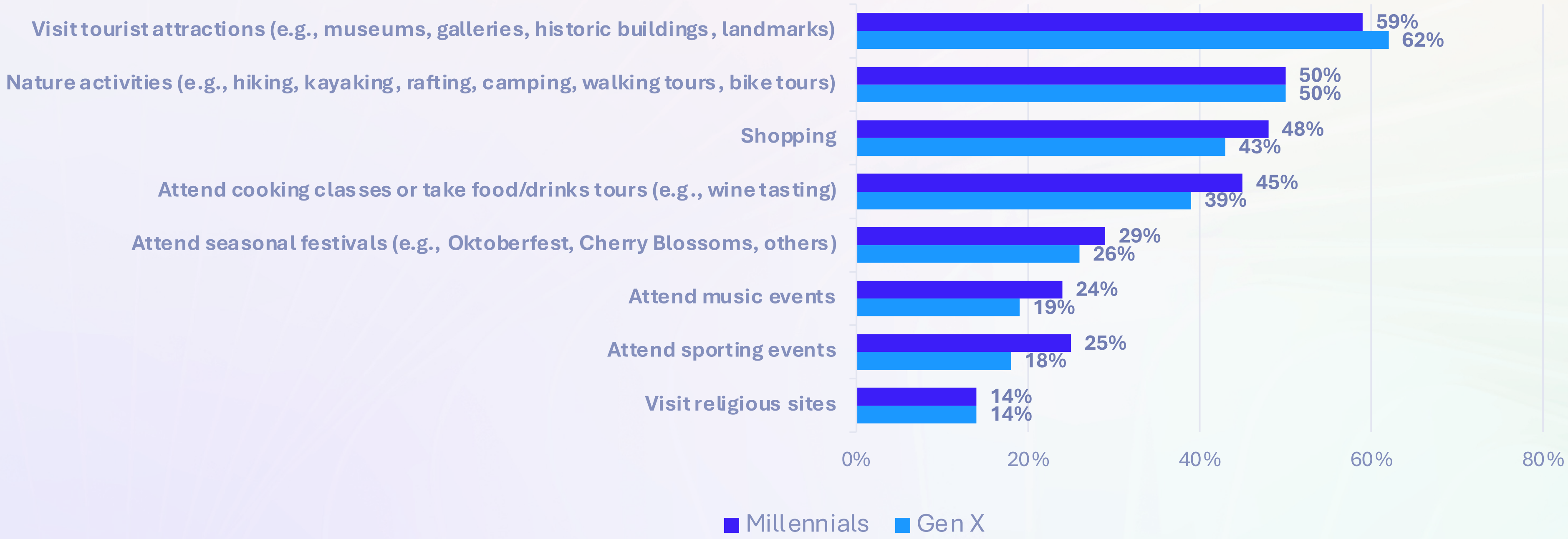
Source: Criteo Survey – Consumer Travel Preferences, February 2026, Global (US, UK, FR, DE, JP, KR). N=4,275

Experience-led travel is being shaped by Millennial parents

Among traveling families, Millennial parents drive stronger demand for experience-led trips, over-indexing on food, shopping, and events. In contrast, Gen X parents lean more toward traditional sightseeing, highlighting clear differences in travel preferences across parent age groups.

Share of respondents who selected the listed category when responding to the question, "Which of the following are you most interested in participating in during your next vacation? (Select all that apply)."

Sample: Households with children under 18; Breakdown: Gen X vs. Gen Y



Source: Criteo Survey – Consumer Travel Preferences, February 2026, Global (US, UK, FR, DE, JP, KR). N=1,894

Family travel drives a mix of necessity and lifestyle retail spend

Parent travelers demonstrate strong retail engagement across both the US and Europe, spanning a wide range of categories. While purchases in toys and electronics reflect family-driven needs, they also over-index in categories like jewelry, skincare, and makeup.

Product Penetration Among Parent Travelers

	Toys & Games	Electronics	Jewelry	Skin Care	Makeup
Share of US Parent Travelers Purchasing	85%	73%	62%	61%	46%
Share of EU Parent Travelers Purchasing	10%	14%	8%	23%	9%

Source: Organic Criteo Data. US and EU (FR, DE and GB) air bookers from Jul 1-7, 2025 who bought retail product during July. Parents are identified as travelers with purchases in parent-related categories in at least 2 distinct months between Jun 1 and Aug 31, 2025.

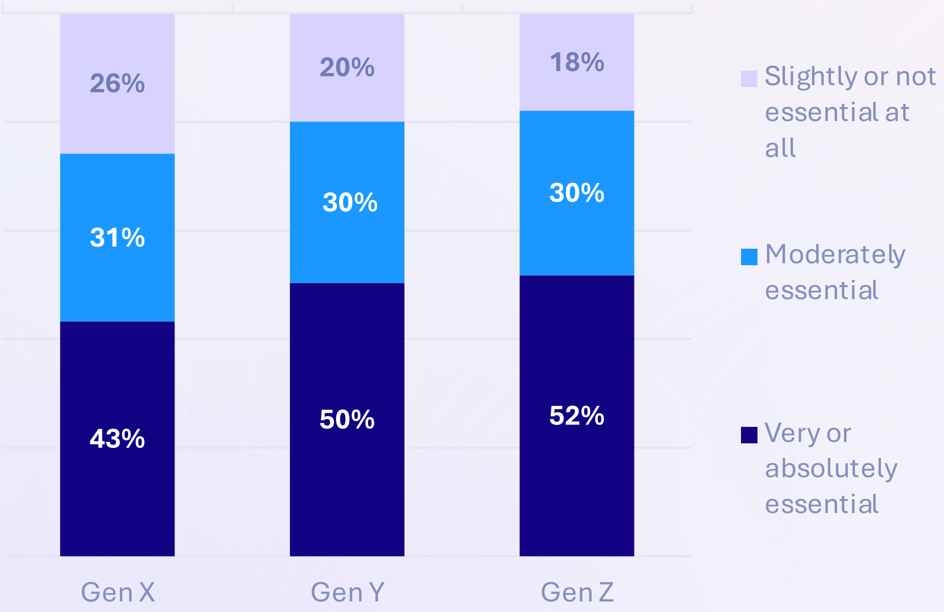
04

Budgets Meet Bucket List

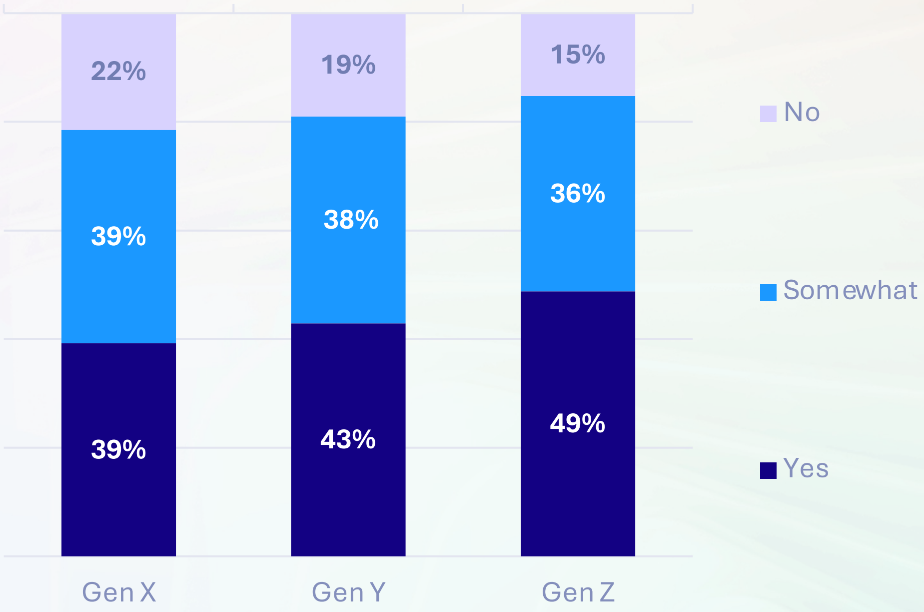
Travel remains a priority, even as rising costs reshape decisions

Travel remains a priority across generations, but rising costs are influencing how people plan. Rather than opting out, travelers are becoming more selective—making value, flexibility, and transparent pricing key to winning demand.

Compared to other lifestyle categories (e.g., fashion, beauty), how essential do you consider travel?



Are rising travel costs affecting your travel plans this year?



Source: Criteo Survey – Consumer Travel Preferences, February 2026. Global. N=5,897

Travelers are optimizing plans to maintain travel

As costs rise, travelers adjust rather than pull back. Booking early (42%) leads the way, followed by traveling during off-peak periods (40%), and choosing less expensive destinations (35%). These behaviors vary by market, with Germany (45%) and South Korea (49%) over-indexing on off-peak travel, while France stands out for comparing multiple providers (36%)

Which of the below do you consider to optimize your travel costs? (Select all that apply)

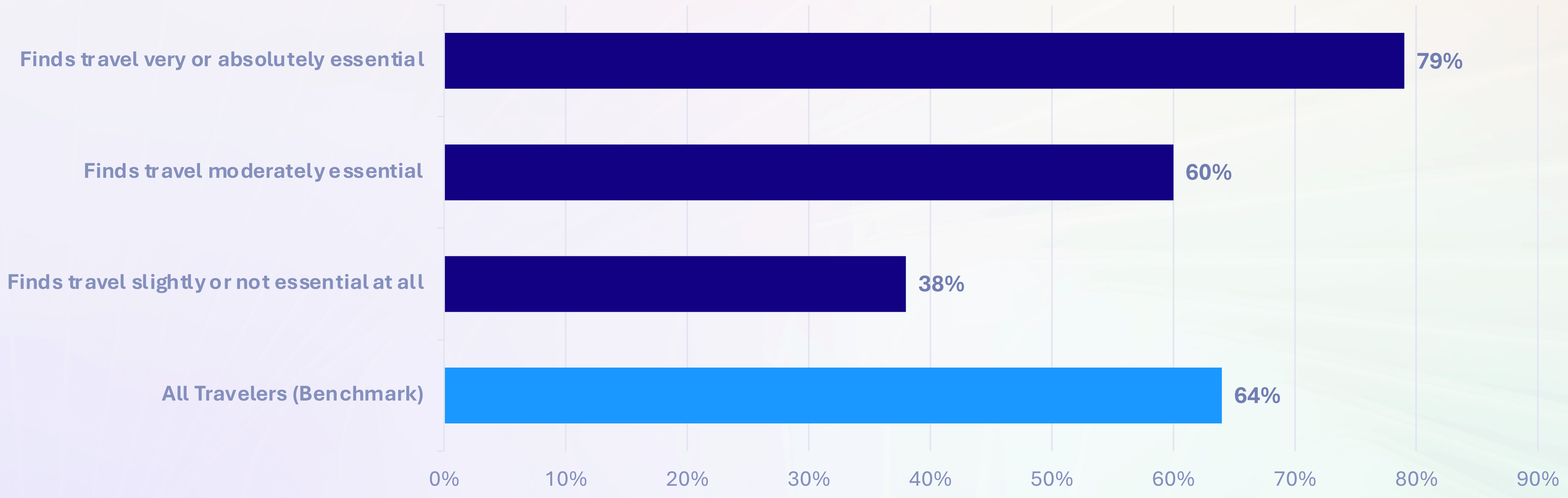
	Global	US	UK	FR	DE	JP	KR
Booking far in advance	42%	41%	45%	48%	39%	41%	37%
Traveling during off–peak seasons	40%	34%	42%	40%	45%	28%	49%
Traveling to less expensive destinations	35%	31%	32%	36%	38%	35%	37%
Choosing budget accommodations	34%	34%	35%	35%	33%	33%	32%
Comparing multiple (3+) travel providers	31%	29%	29%	36%	33%	24%	35%
Traveling shorter distances	27%	27%	22%	21%	24%	33%	36%
Traveling for shorter durations	26%	28%	25%	20%	24%	30%	27%
Optimizing the cost of activities	24%	30%	23%	29%	21%	12%	29%
Utilize rewards from loyalty programs	19%	30%	20%	19%	16%	11%	21%
Optimizing the cost of restaurants	18%	21%	17%	27%	17%	12%	13%
Buying holiday packages	17%	22%	24%	15%	17%	9%	12%

Source: Criteo Survey – Consumer Travel Preferences, February 2026. Global. N=6,379

Travel demand remains resilient, even among lower-intent audiences

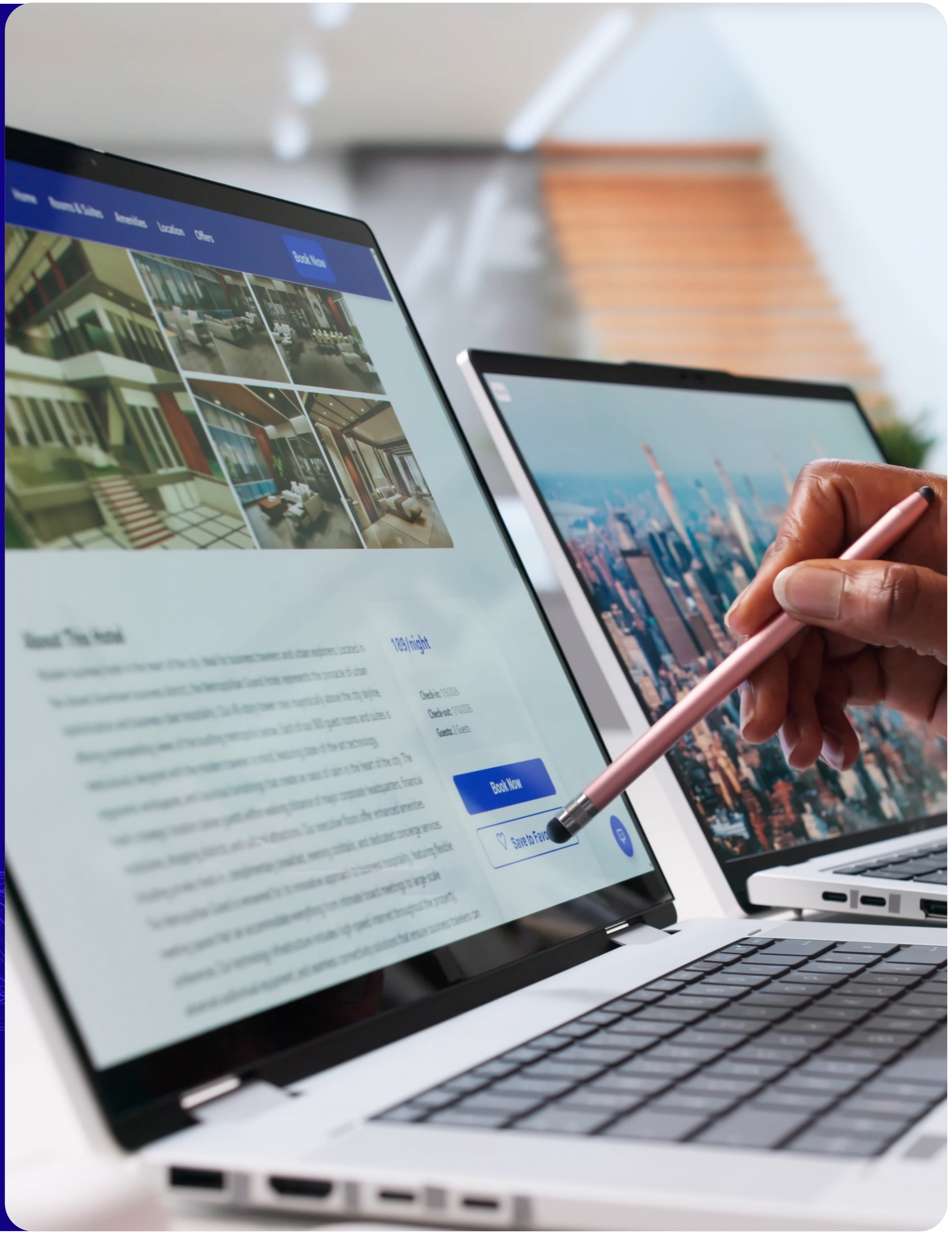
While those who see travel as essential are the most likely to plan (79%), a notable share of those who consider it non-essential are still booking trips (38%). This signals that travel demand is resilient and expandable. Even lower-intent audiences can be activated with the right mix of relevance, value, and inspiration, opening the door to growth beyond core segments.

Share of respondents planning a holiday/leisure trip in the next six months, by perceived importance of travel



Source: Criteo Survey – Consumer Travel Preferences, February 2026. Global (US, UK, FR, DE, JP, KR). N=6,379. Cohorts created using grouped responses to the following question “Compared to other lifestyle categories (e.g., fashion, beauty), how essential do you consider travel?”.

Where Marketers Can Win



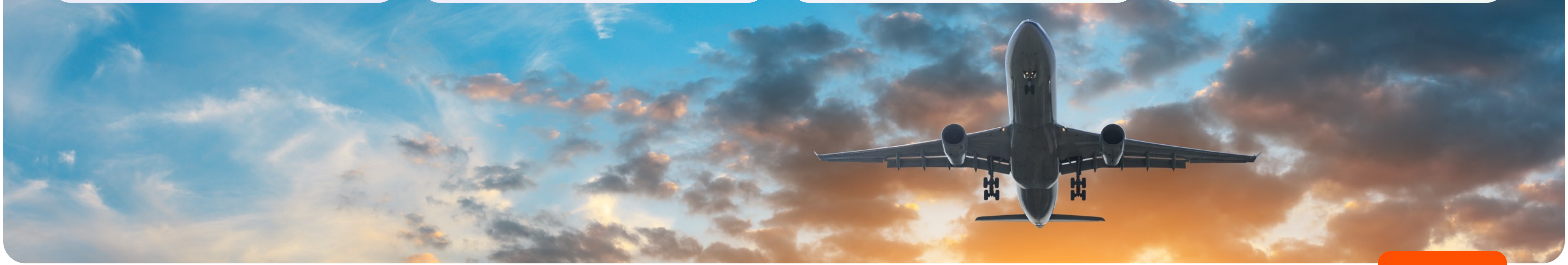
Follow where travel demand is shifting now

Use flight demand as a signal for full-trip intent. Air travel is leading demand, so use flight searches and bookings to drive cross-sell into hotels, packages, and experiences.

Think regional. With demand patterns varying widely by region, adapt your strategy from global to local dynamics (e.g., traffic, booking behavior, category strength) to capture opportunity more effectively.

Adapt to shorter trips without sacrificing value. Travel is shifting toward regional and mid-distance trips, which often carry lower spend. Focus on upsell, bundling, and experience add-ons to maximize revenue per trip.

Prioritize high-intent travelers in a volatile market. Prioritize investment on high-intent users and use smarter targeting to drive efficiency and competitive advantage.



Convert across a more complex travel journey

Plan for more variable journeys. The path to booking is short on average but highly unpredictable. Use always-on strategies to capture users across fragmented decision timelines.

Show up where travelers compare. As travelers evaluate multiple options before booking, ensure your campaigns highlight clear pricing, strong reviews, and differentiation at every touchpoint.

Make AI part of your cross-channel mix. AI is increasingly shaping how trips are researched and booked. Add AI alongside open web, social, and CTV to reach travelers across channels and capture intent earlier.

Reach travelers mid-trip. Not every decision is made before departure. Engage travelers in real time with relevant offers for dining, activities, and local experiences.

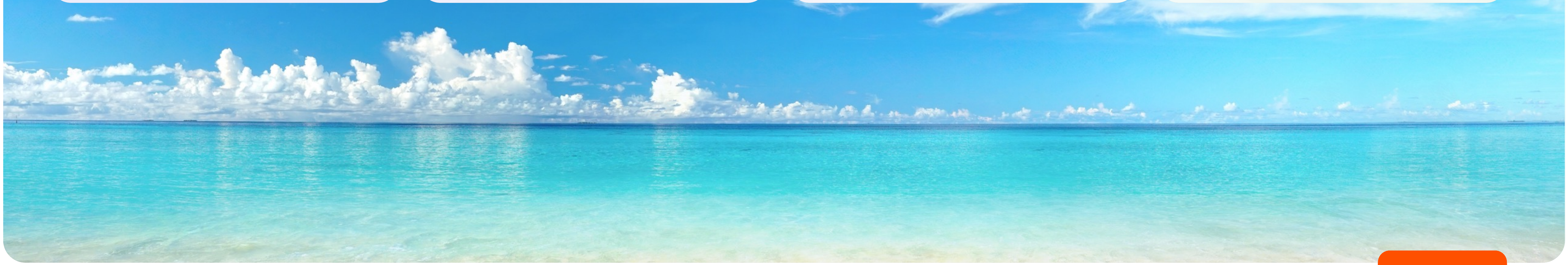
Match campaigns to traveler mindsets

Scale early around peak travel moments. Travel demand surges during peak periods, often outpacing retail. Ramp up acquisition at least 4 weeks ahead of peak booking windows to capture high-intent demand early.

Tailor messaging to generational motivations. Younger travelers skew toward social and experience-led trips, while older audiences prioritize culture. Tailor creative to reflect these distinct drivers.

Prioritize family travelers as high-value planners. Families travel farther, spend more, and plan more complex itineraries. Win with convenience and bundled value.

Personalize messaging and clearly communicate value. As travelers explore more and spend more carefully, tailor ads to traveler intent while highlighting flexibility, transparency, and smart trade-offs to drive conversion.



Thank you

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