TNMT

Beyond Predictions:
10 Wishes for Travel in 2026

Not what's likely. What's necessary.
10 innovation calls for the travel industry.


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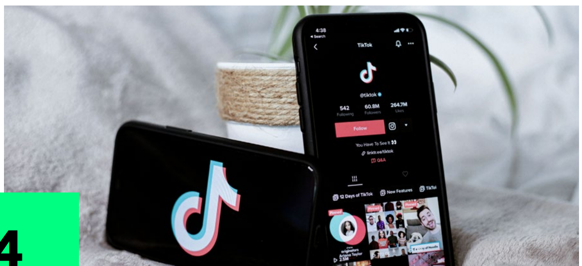
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1 Airlines treat in-flight connectivity as a platform shift

Our wish for 2026: That airlines stop thinking about in-flight WiFi as a nice-to-have amenity and and start treating it as the backbone for real-time, intelligent, passenger-first services.

The aviation world has been buzzing with satellite headlines. Starlink, SES, Viasat, you name it.

Airlines are announcing satellite partnerships faster than you can say “gate change.” And yes, that’s exciting. For two decades, in-flight WiFi was a grudging afterthought: slow, unreliable, overpriced. But LEO satellites changed the physics. Starlink Aviation now delivers 152 Mbps median speeds with 44ms latency. The aircraft cabin is no longer a disconnected metal tube. It’s a fully networked node at 35,000 feet.

But here’s the real question: Will airlines just use this to stream Netflix faster, or reimagine what the in-flight experience could become? Because faster streaming is the obvious move. But what if the real opportunity is smarter commerce, real-time rebooking, live diagnostics, and AI-powered assistance?

Unfortunately, most airlines still treat connectivity as “internet access,” rather than infrastructure for a smarter cabin experience. Imagine this: You’re on a business trip, and your cabin becomes a functioning remote workspace (video calls and all).

You’re headed to Paris, and your seatback screen offers last-minute restaurant bookings and museum passes.

You feel unwell, and a real-time telemedicine station helps avoid an unnecessary (and costly) diversion.

This is the potential. But it won’t happen unless airlines see LEO connectivity not as a cost center, but as a platform shift (like smartphones in 2007 or APIs in the 2010s).

So far, only a few brave signals point in the right direction: Emirates invested $2.4 million USD in Parsys telemedicine stations across 300 aircraft, enabling HD consultations with ground-based doctors, complete with real-time ECGs and oximetry data.

Qatar Airways became the first airline to stream live Champions League matches, bringing contextually relevant content onboard. JSX became the first U.S. airline to allow video calls in-flight, officially turning its cabin into a high-speed workspace.

Each of these examples gives hope. But the gap between what’s possible and what’s being done at scale remains frustratingly wide.

2 Countries remember hospitality is a choice

Our wish for 2026: That destinations remember hospitality is a choice, so they design policies that make tourism a two-way relationship, not a one-sided transaction.

2025 gave us two very similar stories about conflicting tourism realities.

Story one: Spain. The country welcomed a record 94 million international visitors in 2024, nearly double its own population. But back home, the mood was anything but celebratory. In Barcelona, protesters fired water pistols at tourists, chanting "Your holidays, my misery." In Mallorca, around 1,000 residents now live in their cars because housing has become unaffordable.

Story two: The United States. 2025 should have been the year the country's tourism industry gained momentum ahead of hosting the 2026 FIFA World Cup. But things came differently. The U.S. became the only major economy to see tourism revenue decline. Tourism Economics revised its 2025 forecast from +9% growth to an 8% decline. Canadian arrivals dropped nearly 30%. And Congress slashed Brand USA funding by 80%, from $100 million to just $20 million.

The contrast is instructive. Spain is overwhelmed by demand. The U.S. is failing to capture it. And both outcomes stem from policy choices, not inevitability. Destinations can choose to treat travelers as welcomed guests. Or as problems to be taxed, policed, or ignored. They can engage residents as stakeholders. Or watch local frustration boil over in protests, restrictions, and political backlash. The destinations that get this right will prosper. Those that don't will discover that travelers, like water, flow to where resistance is lowest.

3 NDC meets AI agents before it's too late

Our wish for 2026: That airlines stop treating NDC and agentic commerce as separate roadmaps. The companies that win will be those building for both layers simultaneously, recognizing that modern offers are the foundation, not the competitor, of machine-driven booking.

Here's a question that should keep airline distribution executives up at night: What happens when the interface layer for travel gets rebuilt by companies that didn't ask permission?

In 2025, we got our answer. Google launched agentic travel booking with Booking.com, Expedia, Marriott, and more. OpenAI's Operator brought Priceline and Tripadvisor onboard. By September, OpenAI and Stripe had unveiled the Agentic Commerce Protocol. Google followed in January 2026 with UCP (Universal Commerce Protocol), designed to work alongside MCP (Model Context Protocol) and A2A (Agent-to-Agent). The tech stack for machine-driven transactions is being built in real time.

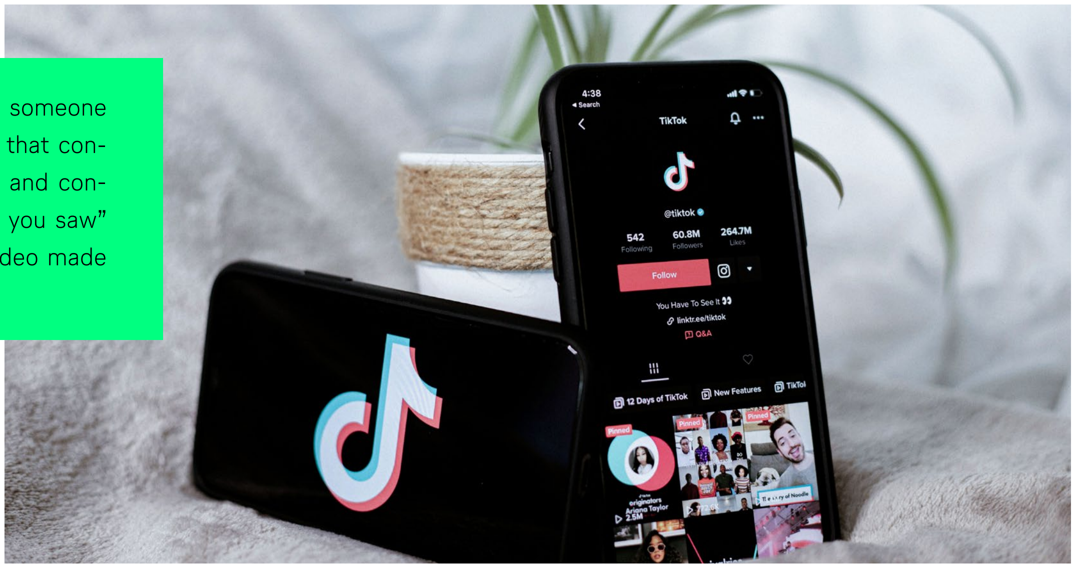
Meanwhile, the airline industry spent 2025 celebrating NDC milestones. Finnair became the world's first airline to issue native orders. Corporate NDC bookings grew 168% year-over-year. Progress is real. But so is the gap: only 27% of airlines have moved beyond basic NDC to full Offer & Order. TMCs still book just 6% of tickets via NDC.

Some observers see these as competing priorities. They're not. They're different layers of the same stack:

NDC and ONE Order are supply-side infrastructure that enables airlines to create rich, structured offers. UCP, MCP, and A2A are demand-side interface protocols that govern how AI agents discover, interpret, and transact those offers.

Here's what the industry hasn't fully internalized: NDC isn't made obsolete by agentic commerce. It's the prerequisite for it. AI agents need structured, real-time data to work with. Airlines still trapped in EDIFACT will find agentic integration harder, not easier, because their offers simply aren't rich enough for machines to process. The real risk isn't that NDC becomes irrelevant plumbing. Airlines without modern distribution infrastructure will be entirely invisible to the agentic layer.

4 Social media closes the inspiration-to-booking gap



Our wish for 2026: That someone finally builds the interface that connects content, commerce, and context. Not “here’s the hotel you saw” but “here’s the trip that video made you want.”

Staying with customer interfaces and the future of travel booking for a minute… In August 2025, TikTok and Booking.com launched a pilot integration that brought hotel booking directly into the social-media feed. Initially rolled out to 10% of U.S. TikTok users searching for U.S. hotels, the feature let users check availability, compare prices, and book without leaving the app. The booking confirmation? Directly sent to their TikTok inbox.

The implications are massive. According to Phocuswright, nearly two-thirds of travelers who use social media for trip planning say they make booking decisions based on content they view. TikTok alone claims 170 million U.S. users spending more than 90 minutes per day on the platform. Add TikTok Go (its creator monetization program) and the friction between influence and booking drops dramatically. Any creator with 1,000+ followers can now earn commission by linking hotels, restaurants, and experiences. In other words: travel affiliate marketing just became a mainstream creator tool.

But here’s the catch: The integration only solves one piece of the journey. Watching a drone video of Santorini might inspire a trip, but that traveler doesn’t just need a hotel. They need flights, transfers, restaurant bookings, experiences, and local recommendations. Right now, they still have to stitch that together themselves (across different tabs, apps, and currencies). The race to close this gap is intensifying. Expedial launched Trip Matching, which turns Instagram Reels into dynamic itineraries. TourRadar introduced a visual booking tool for group travel based on social content. But so far, no platform has cracked the holy grail: Turning spontaneous inspiration into seamless, contextual booking.

5 Loyalty programs actually create loyalty

In 2026, we wish for brands to stop optimizing for enrollment and start optimizing for trust. Build programs that recognize travelers as individuals, not segments. Make redemption intuitive, not transactional. Design for loyalty earned, not just loyalty counted.

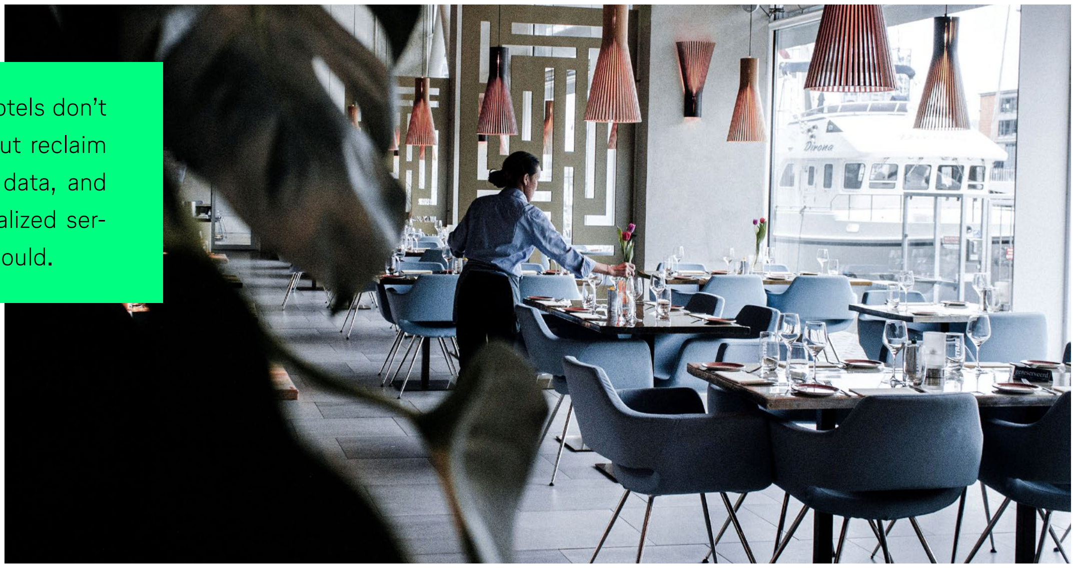
If social media is where trips start, loyalty is where travel brands hope they end up. But loyalty in the travel industry is broken. Here is the loyalty pitch by travel brands: Marriott Bonvoy crossed 200 million members in early 2024. By September 2025, that number had ballooned to 260 million (an 18% year-over-year jump). Every major hotel group tells a similar story.

But let's be clear: membership growth isn't loyalty. The top 1% of Marriott members reportedly generate 35% of gross fee revenue. That's a stunning concentration, and a signal that for the other 99%, the loyalty game is mostly smoke and mirrors. Today's programs (across travel categories incl. airlines) are engineered for points accumulation, not meaningful relationships. Redemption feels increasingly complex. And for many travelers, the value exchange feels more theoretical than real.

Caravelo research found that 92% of loyalty providers (including airlines) believe their programs deliver real value to customers. Ask travelers themselves, and only half of them agree. This gap is not theoretical. It already translates into diminished loyalty behavior, even if airlines don't see it reflected in their bottom line yet. Case in point: airline loyalty members in Europe show the lowest brand exclusivity across all major loyalty categories. Just 13% of frequent flyer members fly exclusively with their loyalty airline. The other 87% occasionally or regularly choose competitors, regardless of their membership status.

6 Hotels (finally) reclaim the guest relationship

Our wish for 2026: That hotels don't just defend the booking but reclaim the relationship, own the data, and deliver the kind of personalized service no intermediary ever could.



Loyalty is the end goal for any brand. But real loyalty starts with something more fundamental: knowing who your guests actually are. Which brings us to our sixth wish. In 2026, we want more (independent) hotels to realize that reclaiming the guest relationship isn't just about improving margins. It's about knowing your customers well enough to surprise them. And that's something no intermediary can do.

The August 2025 TikTok-Booking.com integration let U.S. users book hotels without leaving the app. One industry observer described it as nuking the travel funnel. Hotels get visibility, sure. But every booking still flows through Booking.com's commission structure.

But the tides are turning. Recent distribution data shows OTA share for hotel bookings dropping from 30% to 22% in just one year. In Europe, direct hotel bookings are projected to surge from €32.5 billion in 2025 to €41.3 billion by 2028 (clearly outpacing OTA growth). How come? Hotels are aggressively investing in better booking engines. Personalization that feels human, not creepy. Loyalty perks that actually tip the scale toward direct.

Who's powering much of this shift? A new generation of hospitality tech providers. Mews is the most prominent example. The hospitality OS unicorn just raised €300 million in fresh capital and is rapidly becoming the go-to infrastructure layer for hotels that want to own (not rent) their guest experience. (One reason we named them one of Europe's hidden champions in Travel and Mobility Tech.)

7 Intermodality becomes more than a PowerPoint slide

Our wish for 2026: That flights, trains, and cars finally talk to each other, and travelers stop having to connect the dots themselves.

From hotels to transportation where one of the most frustrating traveler gaps remains painfully unresolved: seamlessly combining different modes of transport in a single, bookable journey. Especially in Europe, the ingredients are all there. High-speed rail networks. Dozens of well-connected airports. Ambitious climate goals. But the reality? Booking a flight + train itinerary still feels like assembling a jigsaw puzzle from five different websites. Travelers are forced to plan trips around transport silos: air here, rail there, car rental somewhere else.

It's not a user problem. It's a system design problem. And ironically, the system knows it. The Open Sales and Distribution Model (OSDM) is supposed to fix this. Sweden made it a national standard. Deutsche Bahn has adopted it. But real-world implementation remains patchy, and reliable intermodal inventory is still the exception, not the rule. Meanwhile, airlines talk about "first and last mile solutions," but rarely enable them in the booking flow. Even when train-air codeshares exist, they're often hidden behind clunky UIs or limited to business travelers.

This is a missed opportunity for travelers, for rail operators, and for airlines alike. For 2026, we wish for intermodality to move beyond the PowerPoint decks and into the passenger experience. Not just the promise of integrated travel. The product. Book a flight to Frankfurt, and add a train to Strasbourg in one seamless flow. Arrive in Paris, and see onward rail options to Lyon, Bordeaux, or Geneva (preloaded into your trip).

We'll never build a more sustainable, smarter travel ecosystem if every mode operates in its own lane. 2026 needs to be the year those lanes finally merge.

8 We stop mistaking marketing for sustainability

Our wish for 2026: That airlines, manufacturers, fuel providers, TMCs, and corporate buyers stop polishing the green narrative and get honest about what it really takes to decarbonize (and what's out of reach).

Wish #7 ended with a call for systems to actually work together. Let's stay on that theme and talk about sustainability. Because here too, what travelers experience today has little to do with what they've been promised. In November 2025, 21 European airlines committed to stop greenwashing after a BEUC complaint. They agreed to drop claims suggesting that paying extra for climate projects or SAF credits could offset the emissions of an individual flight. That's a step forward. But here's the uncomfortable truth: Airlines can't decarbonize alone. And net-zero targets for aviation are increasingly unrealistic. Case in point: SAF production remains stuck at 0.5% of global aviation fuel consumption. Manufacturers are behind on aircraft deliveries, forcing airlines to keep older, less efficient jets in service longer. And the infrastructure to produce, blend, and distribute sustainable fuels at scale? It still doesn't exist.

Meanwhile, corporate travel managers face their own reckoning. CSRD rules are forcing them to track Scope 3 emissions more rigorously and business travel is a big chunk of that. But the data is a mess. Every airline uses a different methodology. TMCs can't offer consistent carbon reporting across suppliers. The result: reports that are technically compliant but practically meaningless. The story repeats itself: siloed actors, conflicting incentives, incompatible systems.

Which brings us back to our theme. Sustainability isn't a PR or communications problem for the travel industry, especially the airline sector. It's not a product feature. It's not a competitive advantage. It's a lack of feasible options and shared infrastructure. And infrastructure only gets built when ecosystems collaborate (not when companies issue solo press releases).

9 The industry builds accessibility once (not airline by airline)

Our wish for 2026: 2026 should be the year the travel industry stops treating accessibility as a checklist and starts treating it like infrastructure.

If Wish #8 was about environmental infrastructure, Wish #9 is about social infrastructure. Because when we talk about making travel more inclusive, accessibility cannot remain a competitive feature. It must become shared infrastructure. In October 2024, the U.S. Department of Transportation fined American Airlines $50 million for serious violations of disability protections, including unsafe assistance that caused physical harm. And that wasn't an outlier. In 2023 alone, U.S. airlines mishandled over 11,500 wheelchairs and scooters. Senator Tammy Duckworth said it best: "Imagine if the American public saw that the airlines broke 892 pairs of legs in a single month." And yet, that's the reality (hidden in the baggage claim reports).

To be fair, some airlines are taking action: United's wheelchair sizing tool has helped over 20,000 travelers since its 2024 launch. Emirates became the first Autism Certified airline. The Hidden Disabilities Sunflower program now operates in 325 airports across 70 countries. These are all good efforts. But that's the problem: they're efforts. Singular, fragmented, non-standardized. Accessibility today is built airline by airline, system by system. That's not necessarily innovation. That's exhaustion for travelers and providers alike.

In 2026, we wish for a unified approach. An aviation ecosystem where accessibility is designed once, then scaled, so that every traveler receives consistent care, no matter the airline, airport, or booking channel. That means: Universal data standards for capturing accessibility needs; shared protocols for handling mobility devices; interoperable systems that carry support preferences across platforms. Because one in six people globally lives with a disability.

10 Travel is recognized as preventive care

So our final wish for 2026 is this: The benefits are proven. Let's build the programs that make restorative travel available to more than just the wealthy.

Our final wish might sound off-topic. But it's arguably the most important reason to keep betting on the travel industry. Because if there's one thing 2025 reminded us, it's this: travel is more than leisure hunting. It's healing. In Sweden, the government leaned in hard. In 2025, the country launched the "Swedish Prescription", a tongue-in-cheek, research-backed campaign encouraging doctors to prescribe nature as medicine. Forest bathing, cold plunges, and sauna sessions were promoted as treatments for burnout, anxiety, and chronic stress (endorsed by physicians across four countries and backed by the Karolinska Institute).

Sounds like a PR stunt? The science says otherwise: The Framingham Heart Study found women who vacationed just once every six years were 8x more likely to develop heart disease. The Multiple Risk Factor Intervention Trial found annual vacationers had 17% lower all-cause mortality and 32% lower heart disease death risk. Wellness tourism is a vital sign. In fact, it's now the fastest-growing travel segment, projected to grow at least 2x faster than general tourism through 2026. GWI data predicts that wellness tourism's annual growth rate until 2027 is 16.6% while general tourism grows at approximately 7-8% annually.

But there's a problem: Right now, wellness travel is a luxury. According to recent surveys, 58% of high-income travelers plan wellness trips. Among lower-income travelers? Less than 30%. That's a significant health gap. So our final wish for 2026 is this: That health systems stop treating restorative travel as indulgence, and start treating it as intervention. What's missing isn't scientific validation (see research above); it's institutional imagination. The health system that figures out how to prescribe and support travel as preventive medicine will discover what pharma already knows: Prevention is cheaper than treatment. And a whole lot more enjoyable.

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