New Sabre industry study finds travel companies making next AI moves amid maneuvering macroeconomic 'fog'

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'Compass: Navigating the Fog' shows travel executives across the industry are protecting and, in many cases, accelerating AI and modernization roadmaps while prioritizing near-term efficiency, automation and workforce tools.

SOUTHLAKE, Texas, Sept. 15, 2026 /PRNewswire/ -- Even as global economic and geopolitical uncertainty persists, travel companies are not standing still. New research from leading travel technology company Sabre (NASDAQ: SABR) finds that many executives are using this period to sharpen their AI and modernization priorities, with 27% accelerating investment and a further majority protecting their roadmaps or shifting spend toward initiatives with near-term return.

Only 17% of executives are curbing modernization spend, suggesting that the dominant response is not retreat, but disciplined movement through uncertainty. Sabre describes this posture as "protection mode:" keeping AI and modernization roadmaps in place while directing near-term investment toward internal efficiencies that can protect margin today. In practice, travel companies are making sharper decisions about where technology dollars can deliver the fastest impact.

The findings come from *Compass: Navigating the Fog*, a new Sabre report combining independent macroeconomic analysis from global financial institution Cantor Fitzgerald with proprietary survey data from travel executives across agencies, airlines and hotels. Together, the data paint a picture of an industry that is not at all stalled, but, rather, is adapting: maintaining long-term modernization plans while prioritizing the investments most likely to deliver returns now.

Crucially, this does not signal operational paralysis. It points to a more pragmatic phase of AI maturity. Facing persistent cost pressures, geopolitical fragmentation and swings in consumer confidence, travel companies are not pausing investment altogether. Instead, they are resequencing their roadmaps, prioritizing near-term, internal AI efficiencies that protect margin before moving to longer-runway, strategic transformation

"This is not a sign that the industry has given up on AI as a growth lever," said **Shawn Williams, Executive Vice President and Chief Operating Officer, Sabre**. "It reflects something more practical. Companies aren't abandoning their roadmaps; they're making sharper decisions about which investments can deliver value right now, sequencing the larger, enterprise-wide initiatives to follow."

What travel executives are prioritizing now

The survey data reveal where that pragmatism manifests:

- **AI budgets are holding, not declining:** Only 17% of executives are reducing AI technology spend. The rest are staying the course or pushing forward – 41% are protecting their core roadmap, 27% are accelerating investment, and 15% are pivoting spend specifically toward cost reduction and efficiency tools.
- **Where the money is going:** The majority are investing to stabilize the business – 70% in workforce tools and workflows, 63% in cost reduction and automation, and 40% in data insights and analytics.
- **Growth persists:** 42% are investing in technology to support enhanced offers and upsell opportunities, and 17% are directing resources to demand forecasting and pricing.
- **Geopolitical instability** is deemed the top threat, but it hits every sector differently: Three-quarters of respondents ranked it their No. 1 concern. For airlines, it shows up as route uncertainty and corporate travel-policy tightening. For agencies, as unpredictable booking lead times and shakier consumer commitment. For hotels, it creates pressure on group business, MICE – meetings, incentives, conferences and exhibitions – and international inbound demand.
- **Soft confidence is creating a tale of two travelers, not weakening demand:** Weakening consumer confidence – the No. 2 concern overall – is changing behavior more than suppressing it. Asset-holding travelers are continuing to spend on premium trips and international travel, while their value-conscious counterparts are choosing more modest options and searching longer before they commit. The cost of holding inventory through that longer shopping window falls on suppliers and sellers alike.
- **Confidence, despite everything:** Two-thirds (66%) of executives say they're confident about the next 12 months, rising to 73% among travel agencies, where demand for specialized services has held up better than expected.

From volume to value: A shift in commercial strategy

The research points to a resilient operating backdrop, with companies becoming more deliberate about where they invest. Many are favoring lower-risk, faster-return initiatives while keeping broader modernization roadmaps intact. Across the marketplace, the shift is less about chasing volume and more about improving the value and profitability of the bookings companies already attract.

"The companies that come out ahead won't be the ones that waited for the fog to lift," added Williams. "They'll be the ones that learned to move confidently through it. Our focus is on helping our customers chart that path with greater certainty."

Five ways travel companies can protect revenue now

To move from diagnosis to action, the report outlines five near-term, high-confidence revenue moves that travel companies can put into practice without long implementation timelines:

- Guarding margin before someone else takes it
- Keeping already-won bookings from falling apart at checkout

- Making up to $3.40 per booking with one payment change
- Handling more volume without adding headcount
- Seeing market shifts before they turn into guesswork

The full detail behind each move – along with the complete survey findings and Cantor Fitzgerald's macroeconomic analysis – is available in the *Compass: Navigating the Fog* report at sabre.com/resources/research/the-fog.

Taken together, the findings show an industry moving more deliberately through uncertainty – and companies that make the right short-term moves now will be better positioned to enter the recovery window from a position of strength.

About the Report

Navigating the Fog is part of the Sabre Compass program and combines independent macroeconomic analysis with Sabre's proprietary survey of 140+ airline, agency and hotel executive respondents conducted in June 2026. For more information, visit https://www.sabre.com/resources/research/the-fog/

About Sabre

Powering the agentic revolution in travel. Sabre is an AI-native technology leader, backed by one of the world's largest travel data clouds. With AI at its core and operating at unparalleled scale, Sabre transforms insights into innovation, empowering airlines, hoteliers, agencies and other partners to retail, distribute and fulfill travel worldwide. Sabre is built on an open, modular, cloud-native architecture and serves as the backbone for both established leaders and bold, new disruptors, guiding them to the next age of travel retailing through intelligent, connected, and personalized experiences.

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