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Holiday Travel in AI Search: The Travel Brands AI Puts on Its List

Which hotels, airlines, booking platforms and cruise lines lead Google AI Overviews and ChatGPT this holiday season, and where travel brands appear as questions move toward booking.



SUMMARY

Key findings

BrightEdge analyzed US holiday travel questions in Google AI Overviews and ChatGPT using BrightEdge AI Hyper Cube, August to September 2026. The study compares brands with their direct competitors in four categories and shows how visibility changes by engine and by question type.

- **American Airlines, Royal Caribbean and Expedia** lead their categories on both Google AI Overviews and ChatGPT.
- **Hotels have a different leader on each engine.** Hilton leads Google AI Overviews at 28.3%. Marriott leads ChatGPT at 29.4%.
- **2.2x:** Expedia's visibility compared with Kayak on Google AI Overviews (31.3% vs 14.4%). On ChatGPT, the gap is 1.4x.
- **38%:** share of booking-intent prompts on Google AI Overviews that name a booking platform, against 12% of inspiration prompts.
- **78%:** Booking platforms appear in 78% of budget-related Google AI Overviews answers, compared with 17% of other answers.
- **9%:** Only 9% of tracked Google AI Overviews prompts have booking intent. Inspiration and comparison questions make up most of the tracked panel.

The same brands lead most categories, but the margins differ

Each brand is compared with direct competitors in its category. Each brand's share of voice is calculated from volume-weighted appearances among tracked AI answers that feature brands in the same travel category. Google AI Overviews and ChatGPT are measured separately.

EXHIBIT 1

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Holiday travel leaders in AI search, by engine

AI share of voice within each category (%), Google AI Overviews vs ChatGPT

Google AI Overviews		ChatGPT		
Hotels A different leader on each engine	1. Hilton	28.3%	1. Marriott	29.4%
	2. Marriott	25.3%	2. Hilton	27.3%
	3. Hyatt	17.1%	3. Hyatt	17.1%
Booking platforms Expedia's lead is wider on Google AI Overviews	1. Expedia	31.3%	1. Expedia	26.6%
	2. Kayak	14.4%	2. Kayak	19.4%
	3. Booking.com	13.6%	3. Booking.com	12.9%
Airlines American leads both engines	1. American	26.6%	1. American	25.3%
	2. United	20.5%	2. United	16.2%
	3. Delta	13.4%	3. Delta	15.4%
Cruise lines Royal Caribbean leads both engines	1. Royal Caribbean	24.8%	1. Royal Caribbean	28.8%
	2. Carnival	17.8%	2. Carnival	22.1%
	3. Viking	13.2%	3. Viking	9.7%

Share of voice: volume-weighted brand appearances among tracked AI answers that feature brands in the same travel category, all intent stages combined. Engine samples differ, so differences are descriptive. Not market share, recommendations or bookings. Source: BrightEdge AI Hyper Cube, US holiday travel prompts, Aug to Sep 2026.

Source: BrightEdge AI Hyper Cube, tracked US holiday travel prompts, August to September 2026. Engines were measured separately with different prompt sets, so differences are descriptive. Not market share, recommendations or bookings.

Airlines. American Airlines leads on Google AI Overviews (26.6%) and ChatGPT (25.3%). Its gap to United is 6.1 points on Google AI Overviews and 9.1 points on ChatGPT.

Cruise lines. Royal Caribbean leads on both engines, at 24.8% and 28.8%. Royal Caribbean and Carnival have higher visibility in this ChatGPT sample, while Viking has lower visibility.

02

Hotels have a different leader on each engine

28.3%

Hilton, Google AI Overviews
(Marriott 25.3%)

29.4%

Marriott, ChatGPT (Hilton 27.3%)

17.1%

Hyatt, third on both engines

Hilton leads Google AI Overviews by 3.0 points. Marriott leads ChatGPT by 2.1 points. Both leads are narrow, so the figures show the observed order rather than a decisive win. For hotel marketers, a leading position on one engine does not carry over automatically to the other.

03

Expedia leads on both engines, but by different margins

2.2x

Expedia vs Kayak on Google AI
Overviews (31.3% vs 14.4%)

1.4x

Expedia vs Kayak on ChatGPT
(26.6% vs 19.4%)

5.0 pts

Kayak's difference between
engines, the largest among
featured brands

Expedia leads booking platforms on both engines. Booking.com is similar on both, at 13.6% and 12.9%.

A closer look at Expedia. Expedia's dedicated Thanksgiving and Christmas deals pages bring together destinations, packages, offers and planning information, with clear paths to booking. In the reviewed examples, Kayak emphasized trip-planning content, while Booking.com emphasized deals. These differences illustrate how booking platforms organize seasonal content, although the research does not establish that they caused Expedia's lead.

04

Booking platforms appear more often in booking-intent questions

BrightEdge grouped tracked holiday travel prompts into three intent categories: inspiration, comparison and booking. The companies in AI answers shift with the type of question.

EXHIBIT 2

Google AI Overviews, share of prompts naming	Inspiration	Comparison	Booking
Booking platforms	12%	25%	38%
Expedia	4%	13%	23%

Platforms and organizations such as YouTube, Reddit and AAA are more prominent in inspiration questions. Hotels and cruise lines feature more heavily in comparison questions, while booking platforms appear more often in booking-intent questions.

Only 9% of tracked Google AI Overviews prompts fall into the booking-intent category. Inspiration and comparison account for most of this panel, making them important areas for travel brands to measure visibility and competition.

05

Budget-related questions feature booking platforms more often

78%

Budget-related Google AI
Overviews answers naming a
booking platform

17%

Other answers naming a booking
platform

44%

Budget answers naming Expedia

Booking platforms appear in 78% of tracked Google AI Overviews answers involving terms such as "cheap," "deal," "budget" or "last-minute," compared with 17% of other answers. Expedia appears in 44% of the budget-related answers.

The pattern suggests that price-focused questions are an important area for booking platforms to track. It is an observed association, not evidence that using these words causes a brand to appear.

Sections 04 and 05 use the share of tracked Google AI Overviews prompts that name a company or company type. They are not the within-category share of voice figures in Exhibit 1. Intent labels describe question types, not the journey of an individual traveler.

Key takeaways for travel marketers

- 1. Benchmark against direct competitors on each engine.** A leading position on Google AI Overviews does not guarantee the same position on ChatGPT. Track category visibility and the gap to your closest competitors.
- 2. Review seasonal content against the questions travelers ask.** Make destinations, amenities, packages, prices and booking options easy to find, and keep the information current. Pay particular attention to comparison and budget-related questions.
- 3. Understand which sources shape AI answers.** Track the publications, guides and tourism sites cited in holiday travel responses, and identify where your brand is missing from relevant answers.

METHODOLOGY

About this research

- **Data:** BrightEdge AI Hyper Cube, US English holiday travel prompts, August and September 2026.
- **Sample:** 9,720 Google AI Overviews observations and 1,122 ChatGPT observations, including repeat measurements of the same prompts across the two months.
- **Share of voice within category:** calculated from volume-weighted brand appearances among tracked AI answers that feature brands in the same travel category, all intent stages combined.
- **Categories:** hotels, airlines, booking platforms and cruise lines. Non-travel platforms such as YouTube and Reddit are excluded from the category rankings.
- **Engines:** measured separately, with different prompt sets. Gemini is not included. A brand appearing in an answer does not mean it was recommended, selected or booked.

NEXT STEP

Stay ahead with BrightEdge

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See which brands AI engines name and cite for your category, and compare your visibility with competitors.

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AI Agent Insights

See which AI agents visit your site, what they request and where they hit errors.

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