

Hotel Sourcing 2026

What's trending?

Another hotel sourcing season has concluded and with it we're seeing what travel managers worldwide are prioritizing most. Here, we share three topics that have emerged during the 2025 season, insights that can help shape your strategy for the year ahead.

Hotel sourcing in numbers

Across 2025, we delivered more than 80,000 hotel request for proposals (RFPs), each one giving us deep insight into pricing dynamics. The good news for travel managers: the average weighted rate (AWR) landscape experienced only modest uplifts for 2026, with the global average sitting at just 1.3%. This minimal uplift reflects both industry dynamics and our team of consultants' strong negotiating abilities on our client's behalf.

How did some of the big players perform?

Countries such as the US, which is forecast to see a slight decline in international visitors in 2026¹, held almost flat at +0.5%, whilst in-demand India continued to drive forward, commanding rate increases of +7.1%. Macroeconomic performance clearly shaped corporate rate outlook in meaningful ways. Although rates in India did reach slightly above what was forecast² our team of Consultant's were able to reduce rates by 5.5% on average from first to final bid received.

\$1.8B

Spend addressed

80,000+

Hotel RFPs

9.4M

Room nights sourced

307 properties

Average program size

+1.3%

Year-over-year average weighted rate

1 Rate development by tier

Midscale hotels led with the strongest year-over-year rate growth at +2.6%, driven largely by a preference for last room availability (LRA) at these properties (81%), rates which are typically priced more competitively. This was significantly up from the previous year when just 47% of midscale properties offered LRA.

Economy properties embraced non-last room availability (NLRA) rates during 2026 sourcing, with 27% of this tier joining programs under this rate type.

Luxury (16%) and upper upscale (19%) hotels gravitated toward dynamic rates, which makes sense given that luxury properties delivered exceptional performance in 2025³, and dynamic rates provide the revenue management flexibility they need to capitalize on that momentum.

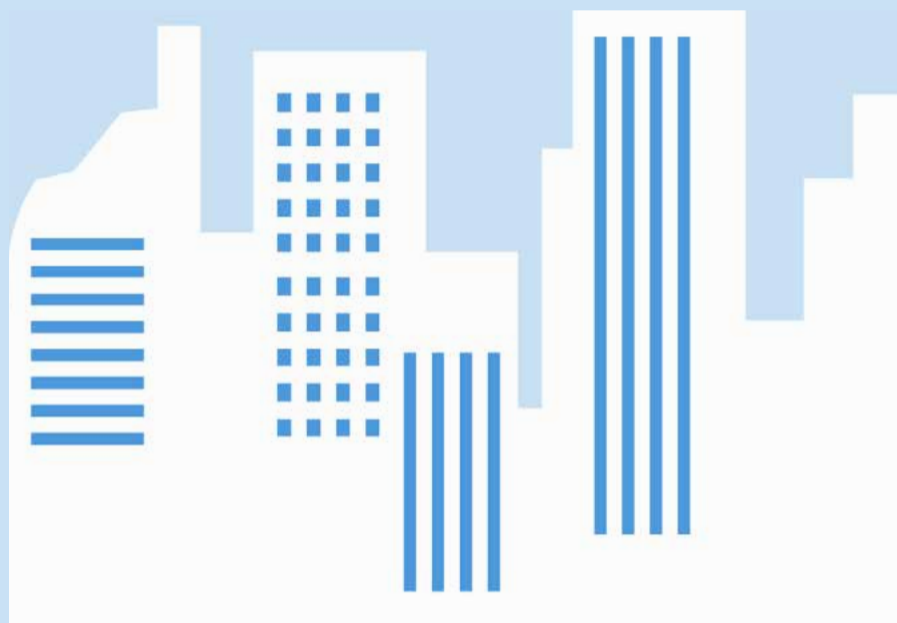
Consider your program's tier distribution; it's important to spread the property types available to your bookers. This provides choice while helping you adapt to changing rate dynamics.

+2.6%

YOY rate increase at midscale hotels

+34%

YOY increase in LRA preference for midscale hotels



2 Growing, holding and declining

In recent years, suppliers have emphasized shifting focus to static NLRA rates. Yet the actualized data tells a different story.

This rate-type remains flat in adoption at 13% of all accepted properties, unchanged from last year. Static LRA remains the most popular rate type particularly for new properties joining programs.

However, static LRA is declining slightly, down 3% year over year.

We're seeing that 3% shift toward dynamic rates, which have grown steadily throughout our last six months of contract negotiations.

Dynamic rate types offer smooth negotiations and can come with strong depth of discounts. If you haven't yet explored this rate structure, why not sample it in some of your lower-volume locations to begin with?



3 The China-Japan rate divide

The tides are turning as it relates to inbound international visitors to China, helped greatly by the easing of visa restrictions⁴. Yet until now, the outlook for Chinese hotels hasn't been optimistic and oversupply in many key locations has made revenue management challenging.

Despite growing demand, average rates have fallen by 1.3%. Notably though, just across the ocean, the picture is quite different: in Japan abundant leisure demand⁵ has led to many corporates finding negotiations more of a challenge in Japan where AWRs have increased +5.3%.

Supply and demand is the very core of the hotel business. Be sure to track the different factors that impact this balance within your top locations. From geo-political matters to large events, understanding rate movement caps here. Consider introducing rate caps, with routine review, to manage within, and respond to pricing spikes.

-1.3%

YOY rate decrease in China

+5.3%

YOY AWR increase in Japan



"Rates are growing globally, which is to be expected as operational costs such as labor, energy and food and beverage continue to rise. However, the key lesson from this year's sourcing season is that increases are happening at a more measured pace than you've seen in recent years. As you build your next hotel program, consider how regional dynamics will shape rate competitiveness and accessibility for your travelers. Amex GBT Consulting can help you navigate this through our hotel marketplace, which gives you access to thousands of rates that work for your business and your people."

Cameron Spence
Global Hotel Practice Line Lead



This piece addresses trends and results that took shape before the start of the conflict in the Middle East. To understand what the conflict in the Middle East means for business travel and how you can respond to safeguard your travel program, read our [Business travel bulletin](#).

References:

- 1 Skift, February 2026. [U.S. Inbound Tourism Slump Deepens to Start 2026](#).
- 2 American Express Global Business Travel, September 2025. [Hotel Monitor 2026](#).
- 3 Hospitality.today, November 2025. [Wealthy travelers fuel a luxury hotel boom](#).
- 4 World Tourism Forum Institute, February 2026. [China Inbound Tourism 2026-2030: The Complete Market Analysis and Future Outlook](#).
- 5 The Independent, January 2026. [Japan welcomes record 40 million tourists in 2025 – but Chinese visitor numbers crash](#).

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