

Report

Beyond the interface

How Agentic AI is quietly rewriting the rules of digital engagement across Travel & Hospitality



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Strategic framing

Travel & Hospitality have proven to be remarkably resilient through many waves of disruption. From economic downturns and geopolitical tensions to the pandemic and platform revolutions, there is one constant that has powered that resilience. Peoples relentless desire to connect through experiences.

It's why, across genders, geographics, generations and wealth profiles, Travel & Hospitality remains the world's most preferred luxury category. Yet no travel, hotel or lifestyle brand ranks among the top 15 most loved luxury brands, a paradox that exposes a deeper, industry-wide gap between expectations and experience.

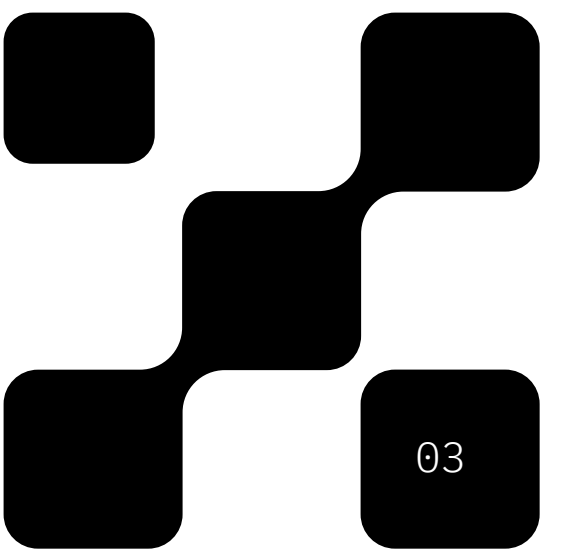
This paradox is not limited to luxury; it simply makes the gap more visible. Siloed data, disconnected systems, and fragmented touchpoints create experiences that get customers to where they need to be, but limits the relevance and emotional resonance they gain.

Nine months ago, Generative AI as a primary channel for trip discovery & planning felt speculative. Today, it's mainstream. And the next frontier, Agentic AI, is emerging as the most transformational catalyst: autonomous, cross-system, action-oriented capabilities that can finally break the industry's fragmentation problem and enable more moments of genuine human connection.

The biggest barrier now isn't the technology itself, but the mindset required to unlock it.

Are brands ready to move from risk-averse protection of data and systems to a world where context is shared, tools are exposed and collaboration becomes a competitive advantage? This report explores what that shift looks like and how Travel & Hospitality leaders can thrive in an Agentic future.

The human truth in an AI-mediated context



The human truth in an AI-mediated context

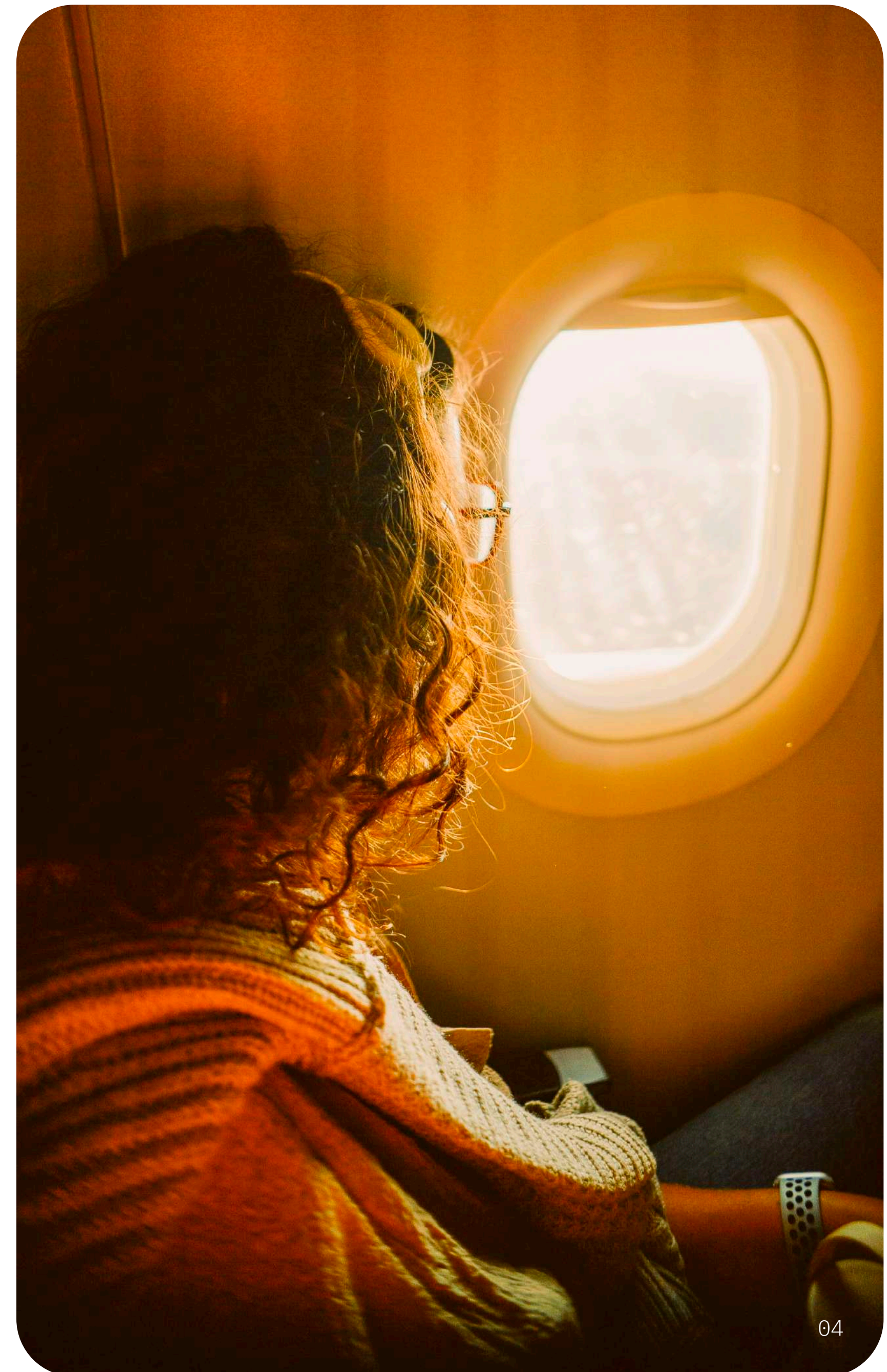
Cultural Truth | The shifting cultural context shaping the reality of traveller today

People are navigating a world that feels increasingly noisy and disconnected. Digital life has become a source of overload: feeds feel untrustworthy, algorithms feel extractive, and the constant pull for attention has left people overstimulated yet underwhelmed.

In this context, travel has taken on renewed cultural significance, not just as escapes, but intentional reconnection with ourselves, with others, and with the world around us.

At the same time, GenAI has flipped the script on what digital interaction and engagement can be. Offering the ease of multi-model interactions through more human-like, contextual and relevant conversations in response to specific user need.

This is the cultural foundation from which today's AI-mediated travel behaviours are growing.

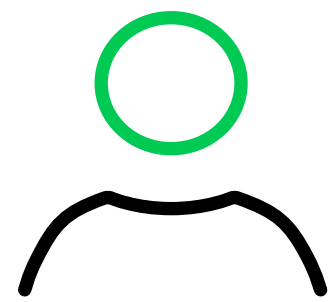


Cultural Energies

The universal truths of what matters most to global travellers today and how GenAI is closing the gap on their expectations

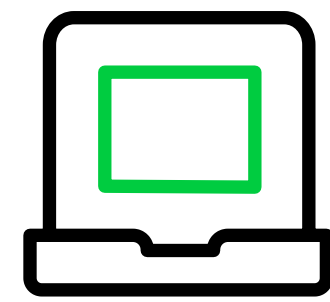


Disconnect to connect



Human shift

Digital fatigue is at an all-time high and loneliness is rising globally. From the UK's £30 million "Know Your Neighbourhood Fund" to Seoul's "Loneliness-Free City" investment, governments are treating connection as a public priority. People increasingly want richer, more present experiences with the people who matter.



AI-mediated shift

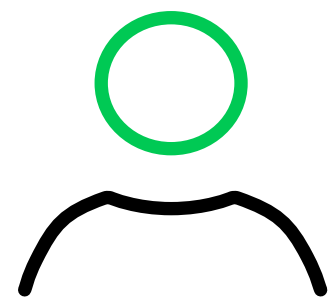
Travellers are turning to conversational AI to minimise the planning burden so they can maximise time together. They ask for itineraries that optimise connection, not just location. AI reduces logistical overwhelm so the human moments can take centre stage.

More than

90%

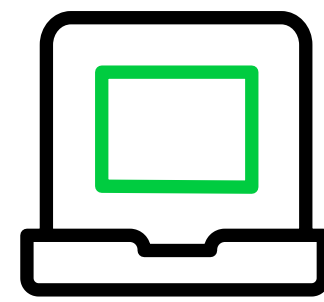
of customers report some confidence in accuracy of travel information that they receive through GenAI.

From overwhelm to clarity



Human shift

Information abundance has tipped into cognitive exhaustion. Fake reviews, deepfakes, algorithmic noise, and endless choice erode consumer confidence. People no longer want “more”; they want better; fewer choices, presented clearly and personally.



AI-mediated shift

Travellers now write longer, richer prompts that express context, desires, and intent. They ask AI for judgement, not options. As AIs synthesise across data sources and compress infinite scroll into a single confident answer, discovery becomes a curated pathway rather than a chaotic quest.

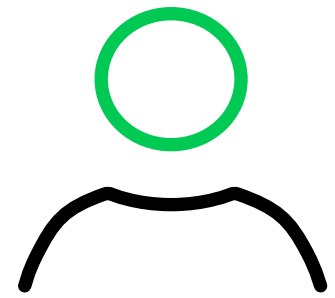
59.9%

of people question the authenticity of online content more than before, while 52% have encountered deep-fake attacks or scams.

55%

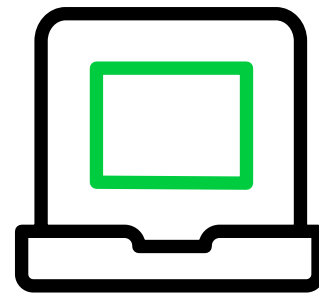
of people prefer quick solutions over traditional methods. Anything that can help do things faster, better or more accurate.

Rewilded travel



Human shift

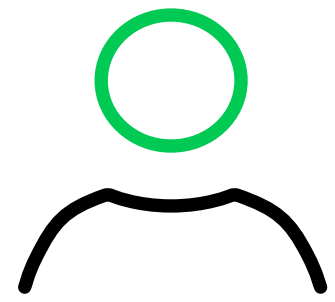
People are moving beyond Instagram-optimised destinations toward experiences that offer genuine cultural anchoring and meaningful engagement with local traditions. Movements like “Untourism” signal a shift away from over-engineered itineraries in favour of meaning, experiential depth, and uniqueness in their travel planning.



AI-mediated shift

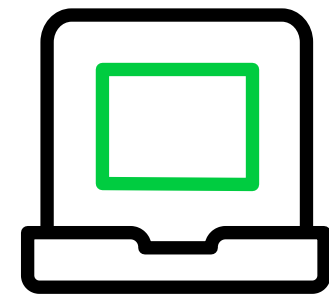
Travellers are using GenAI to seek out small, lesser-known, and culturally rich experiences. They ask for “hidden”, “local”, “textural”, “non-touristy”, and “culturally grounded” trips. GenAI platforms are surfacing options that travellers feel is more aligned to their identity and values than any OTA filter ever could.

Technologies invisible role



Human shift

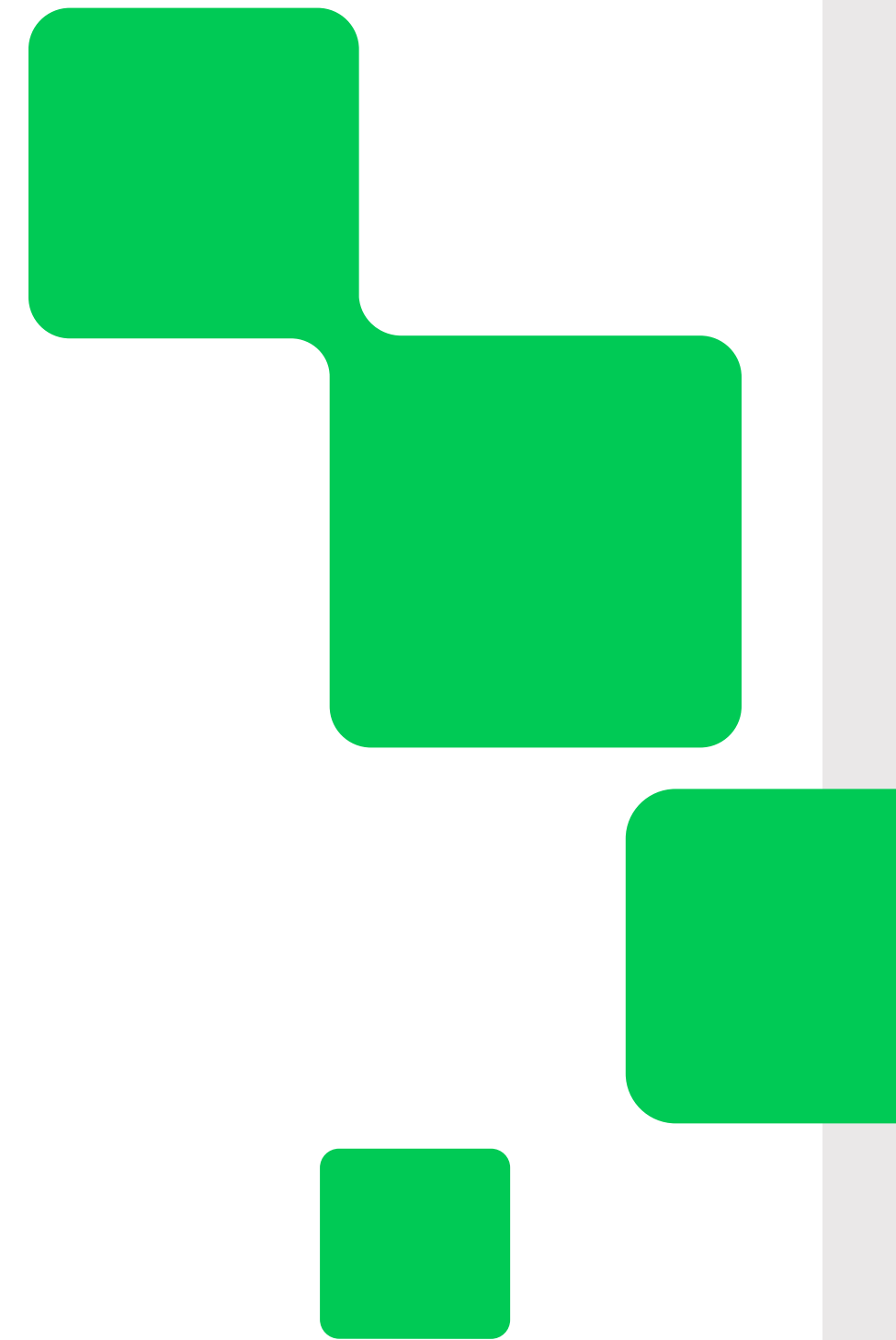
People have never been more connected through our phones, smart watches, laptops, tablets, and now device categories like Meta Ray-Bans that blur the boundary between physical and digital life. Yet, paradoxically, the more pervasive technology becomes, the more people want it to recede. They don't want less capability; they want less intrusion.



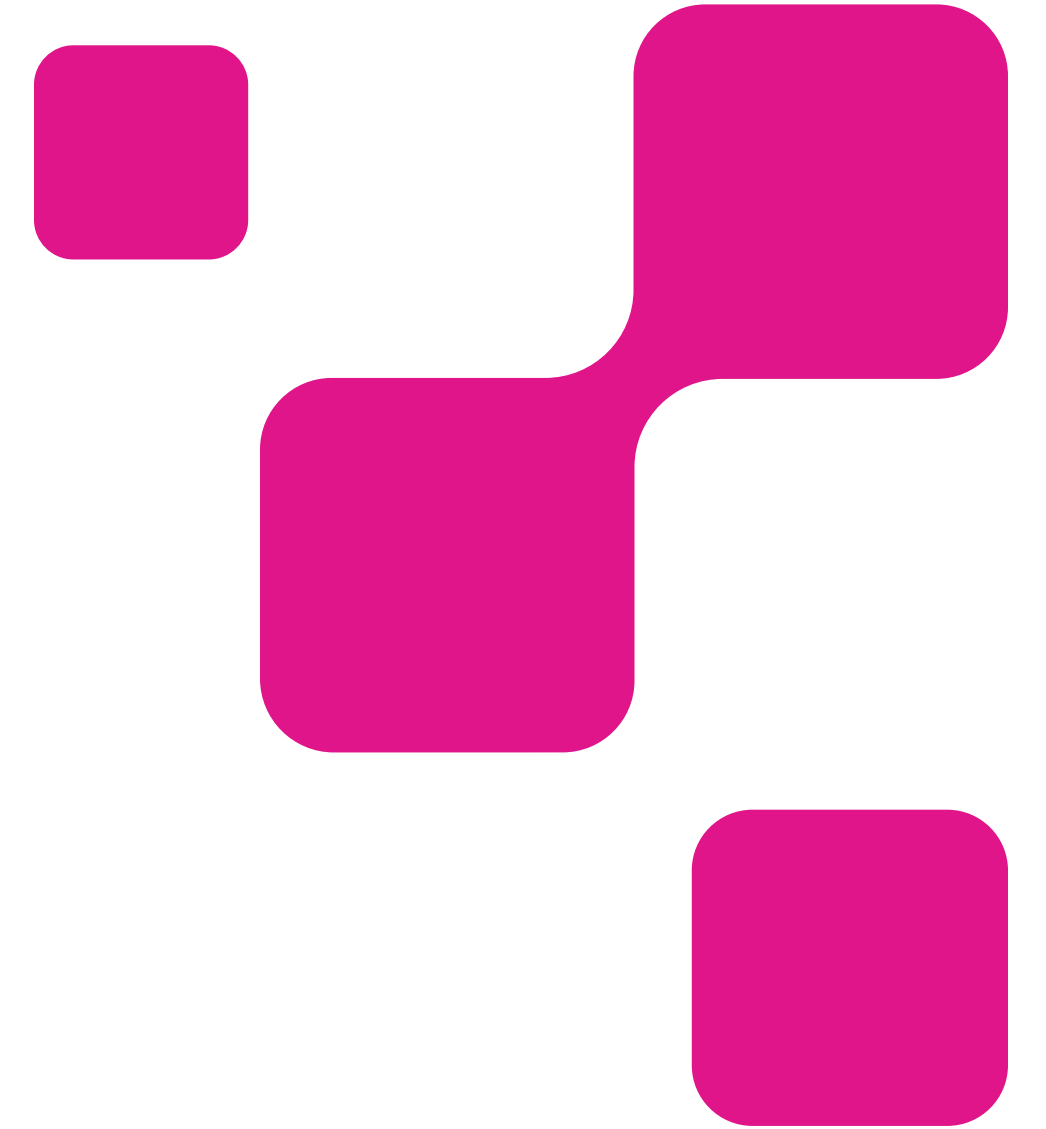
AI-mediated shift

As scepticism in GenAI fade, and adoption grows so does satisfaction and trust. Travellers using GenAI are starting to expect seamless experiences where preferences are remembered, needs are anticipated, and logistics fade into the background so they can focus on the people and places that make travel meaningful. When technology becomes the focus rather than the facilitator, it fails its fundamental purpose in this sector.

These cultural shifts, combined with rapid adoption of GenAI platforms, has given rise to a new behavioural paradigm in travel:



The curation economy



Travellers no longer search, browse, and compare in the way they once did. Instead, they curate. Expressing richer needs, asking more specific questions, and relying on AI to assemble options that match their intent.

This shift is driven by three behavioural changes:

01

Queries are longer and richer

People share context, goals, constraints, values, not keywords.

02

Search is broader and more integrated

AI draws from multiple data sources at once, building nuanced, multi-dimensional answers beyond what a single website or OTA can provide.

03

Responses are more opinionated

Travellers increasingly expect a curated answer, not a list. They want synthesis, judgement, and clarity; and GenAI delivers it.

As a result, the logic of visibility is changing.

If a brand's content, data, and narratives are not part of these AI-mediated conversations, they risk becoming invisible at the exact moment travellers are making decisions.

This isn't a crisis; it's a new reality. And it is now shaping the expectations travellers bring into every interaction.

Cultural tension

The persistent problem

The uncomfortable truth is that after the waves of digital transformation across the industry, there is still friction in the experiences travellers/guests expect. Booking funnels have improved, but the guest experience has fragmented. Vast pools of preference data exist, yet interactions still feel generic. Loyalty programmes reward frequency, not the emotional resonance that drives true advocacy.

*This isn't a marketing failure;
it's a systems failure.*

Siloed platforms force travellers to repeat themselves. Personalisation lacks depth because data can't flow. Loyalty feels transactional. Technology keeps extracting data while delivering little value in return. Trust erodes with every irrelevant email, generic offer, and broken handoff.

Initiatives like chatbots and copilots scale quickly but deliver diffuse results. Other use cases that could truly transform travel often stagnate in pilot mode, never reaching the operational scale travellers would feel.

Two industry-wide barriers sit at the heart of this: Fragmented data ecosystems that prevent real-time, personalised AI experiences; and ahistoric underinvestment in technology relative to the sector's focus on human service.

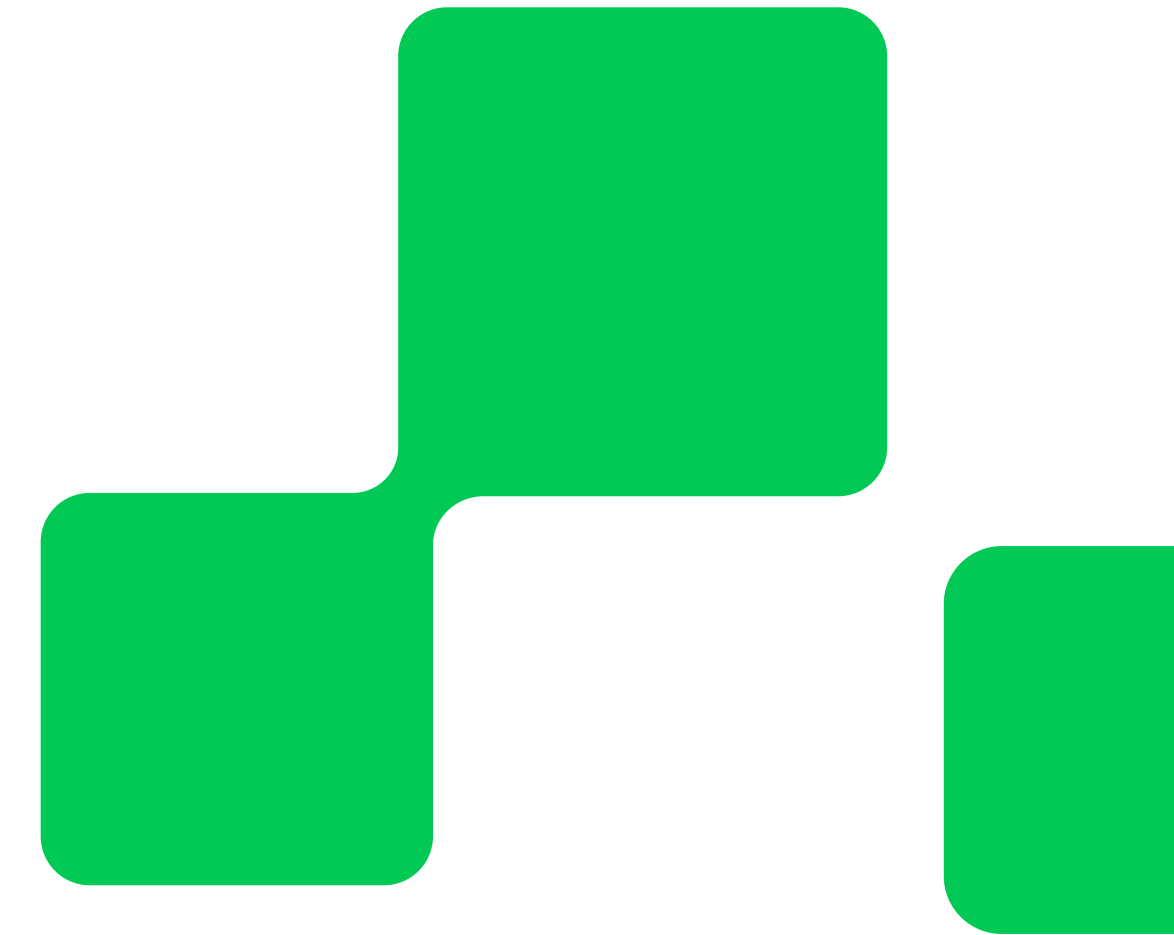
These challenges create a widening gap between traveller expectations in an AI-mediated world and what most organisations can deliver today.

AI could deepen this gap, automating without meaning, or finally close it by becoming the connective tissue that unifies systems, empowers staff, and restores hospitality's human essence.



Strategic provocation

How do brands remain both visible and meaningfully represented when AI becomes the new intermediary?



01

Be present where AI crawls

Ensure your content can be easily ingested, interpreted, and surfaced by AI systems. This means structured, high-quality, query-aligned information that answers traveller's questions at AI entry points, not just traditional SEO touchpoints.

02

Shape the narrative through public signals

Social proof, reviews, digital PR, and cultural conversation increasingly feed AI's perception of your brand. Positive public sentiment becomes a strategic signal that influences how AI summarises, recommends and ranks you.

03

Create clear pathways into your ecosystem

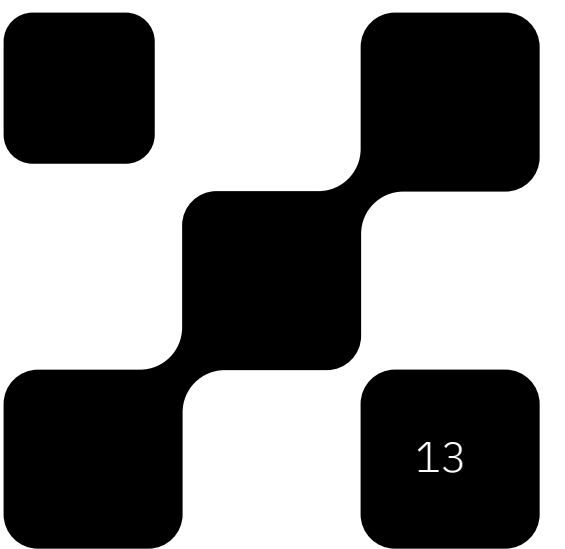
Travellers now arrive from far more complex entry points. Prompts, agents, multi-modal queries, conversational threads. Create pathways, content structures, and experience flows that help AI route users accurately and allow travellers to move from intent to immersion seamlessly.

04

Safeguard accuracy & representation

Monitor how AI platforms interpret, describe, and recommend your brand. Inaccurate or outdated responses not only damage decision-making, they erode trust. Organisations must actively identify misrepresentations and correct the underlying content, data, or metadata that drive them.

The next frontier of agentic AI



The next frontier of agentic AI

The shifts described in the previous section are not end points. They signal far deeper transformation reshaping how people will interact across the Travel & Hospitality industry: the emergence of an agent-mediated ecosystem where intelligent agents will interact directly with each other on behalf of customers and operators to deliver proactive, hyper-personalised experiences in real-time.

What makes an Agent distinct to what we see today with GenAI interactions?

The fundamental difference is Agency. The ability to think, plan and act autonomously. With these characteristics, agents will not be waiting for prompts, but rather agents proactively solving problems. They do this by:

- Breaking down complex goals into executable tasks
- Dynamically selecting the right tools to perform the required tasks
- Proactively learning, iterating and optimising from its own interactions and results

This creates a key shift in the behavioural paradigm mentioned before: a world where travel is curated for you, not by you.

Already, there are players paving the way with this technology, but sceptics among business and consumer adoption is prevalent. Only 2 percent of respondents in Skift's State of Travel 2025 report say that they're currently willing to give an AI tool full autonomy to "take the wheel" to make and modify travel bookings without human oversight.

But, if natural language prompting taught us anything, it's that 'tech for work' quickly spills into mainstream culture, shifting how consumers expect to interact with brands. When customers start to deploy agents beyond work into personal use cases (an inevitable shift, regardless of adoption pace), your brand will need to serve both customers and their agents, each with different needs and expectations.

While frontline leaders may perceive the timeline as uncertain, those closest to data, architecture, and platform modernisation see a clearer horizon. The industry's backend evolution points to a three- to five-year runway before agent-to-agent coordination becomes operational reality.

Only

02%

of respondents in Skift's State of Travel 2025 report say that they're currently willing to give an AI tool full autonomy to "take the wheel" to make and modify travel bookings without human oversight.

Agent-to-Agent coordination:

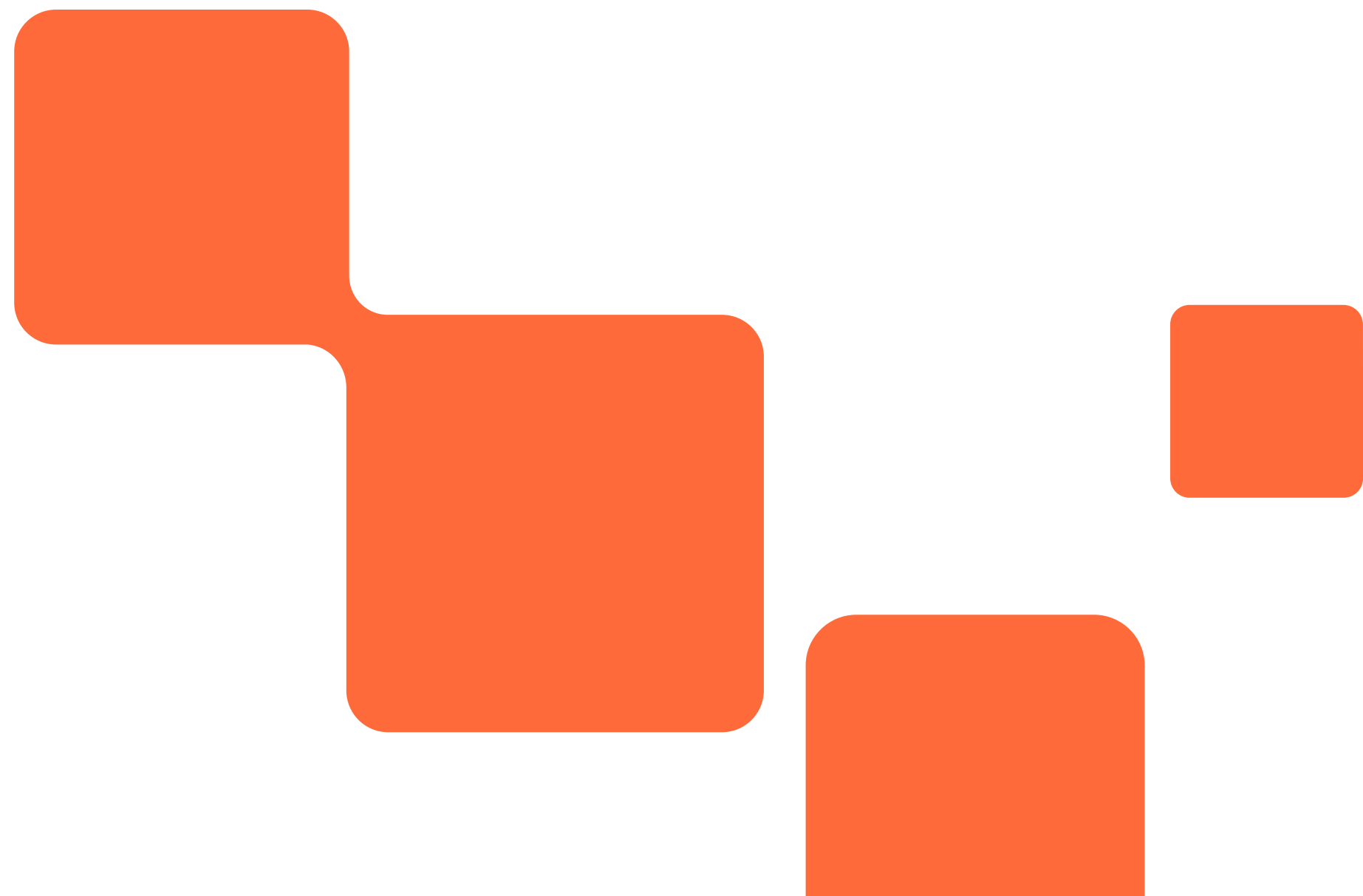
The ecosystem reimagined

The real transformation happens when consumer and operator agents interact directly. Machine-to-machine communication that coordinates complex transactions and service delivery without requiring human involvement at every step.

Consider this scenario: A traveller's consumer agent knows they prefer early check-in when flying overnight from Asia, have a strong preference for king beds and high floors, require dairy-free breakfast options, and typically book spa treatments within 24 hours of arrival. Rather than the traveller repeating these preferences during booking or the hotel scrambling to accommodate requests made on arrival, the consumer agent communicates directly with the hotel's operator agent in advance.

The operator agent confirms early check-in is available, reserves an appropriate room, flags the dietary restriction for F&B systems, and tentatively holds spa availability, all before the guest's flight has landed. If something changes, such as a flight being delayed, the preferred room type becomes unavailable, the spa is fully booked, the operator agent communicates with the consumer agent, which either automatically adjusts plans within predefined parameters or surfaces the decision to the traveller only when their input is needed.

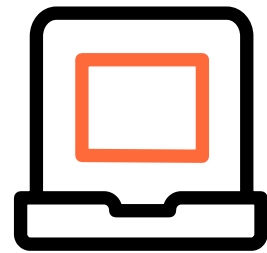
This eliminates the administrative friction travellers tolerate today and unlocks a fundamentally new model of hospitality: one where coordination becomes invisible, and the guest is free to engage only with the moments that matter.



What consumer agents bring:

Intelligence at scale

Consumer-facing agents are rapidly evolving beyond simple task automation towards becoming sophisticated travel companions that handle the entire journey lifecycle.



Planning and booking

These agents analyse stated preferences, inferred behaviours, budgets, constraints, and even subtle patterns like pacing and interests to synthesise options that balance value, convenience, and personal relevance. They don't just search, they reason. They evaluate trade-offs, anticipate unspoken needs, and handle complex tasks such as managing multi-step itineraries, loyalty optimisation, and price fluctuations across channels.



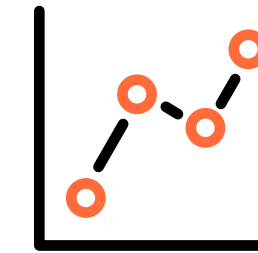
On-trip optimisation

During the stay, agents monitor for service failures or unmet expectations and intervene in real-time.

What operator agents bring:

The intelligence layer

Where consumer agents elevate the traveller experience, operator agents solve a long-standing structural challenge for: intelligent orchestration across deeply fragmented systems.



Inventory and revenue optimisation

Operator agents can dynamically optimise pricing, availability, and channel distribution across the entire business, not just rooms. They unify rooms, F&B, spa, events, and ancillary services into a single optimisation layer that boosts total revenue per guest, not just RevPAR.



Service orchestration

This is where operator agents become transformational for experience delivery. They coordinate across fragmented systems: PMS, CRM, POS, spa booking, concierge, housekeeping - to ensure guest preferences and needs flow seamlessly across every touchpoint.

Addressing the problem of fragmentation

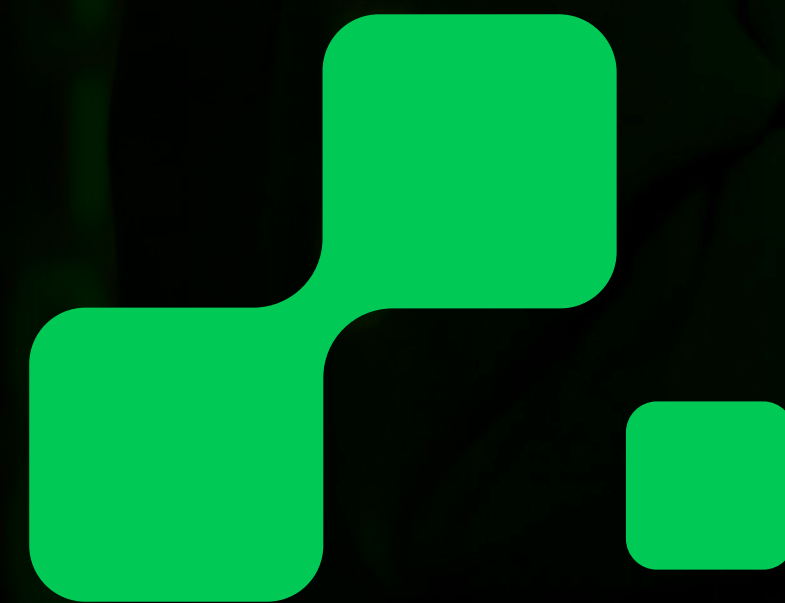
The hospitality technology landscape is notoriously fragmented. A typical luxury hotel operates 15-30 different software systems, each from different vendors, built on incompatible architectures, storing data in inconsistent formats, and requiring manual effort to maintain even basic synchronisation.

This fragmentation isn't abstract. A major international hotel group recently revealed they have 588 different data entry points that aren't integrated, front desk kiosks, property management systems, and direct booking engines all operating as separate islands. As one senior leader put it: "70+ AI projects are really data projects." The fundamental challenge isn't AI capability, it's that decades of fragmentation must be solved before meaningful AI implementation is possible.

Agent-based architectures solve this because agents operate at a higher abstraction layer. Rather than requiring every system to integrate directly with every other system (which creates exponentially complex integration requirements), operator agents integrate with each underlying system individually and then coordinate across them based on guest needs and business rules.

The agent becomes the orchestration layer that sits above existing systems, mediating between them and ensuring information flows where needed without requiring those systems to fundamentally change.

The agentic future doesn't just add capability on top of this fragmentation; it finally provides the economic and technical incentive to solve it. This is why hospitality executives should care about agent architectures even if consumer-facing AI



Creating loyalty through genuinely better experiences

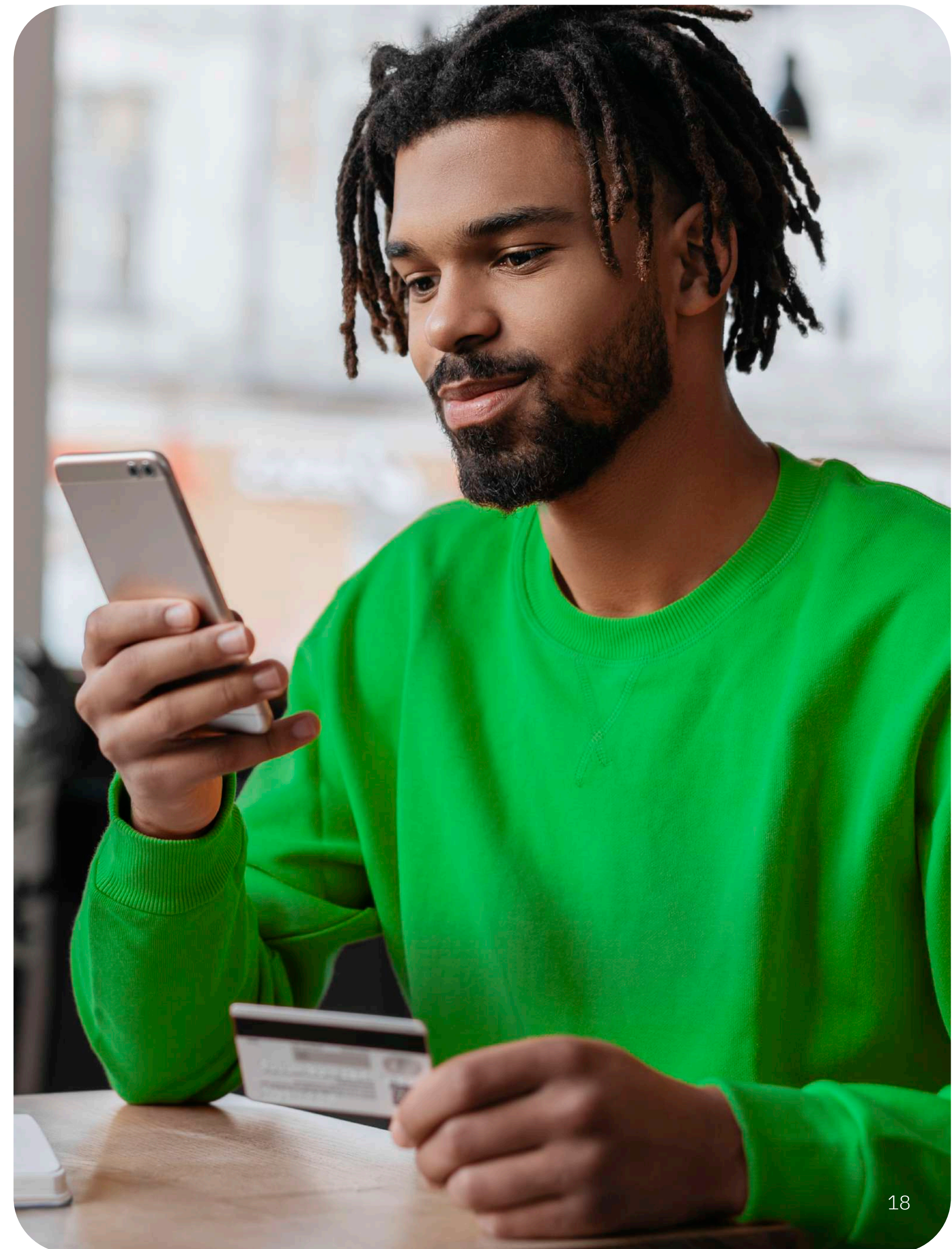
The loyalty program paradigm that has dominated hospitality for decades is showing structural cracks. Points, tiers, and transactional benefits still drive behaviour, but they create mercenary loyalty; guests stay because switching has friction, not because they genuinely prefer the experience.

Agent-mediated experiences create a different loyalty dynamic. When a hotel's operator agent has learned your preferences across dozens of stays, coordinates seamlessly with your consumer agent, and consistently delivers experiences that reflect genuine understanding of your evolving needs, switching hotels means losing that accumulated relationship value.

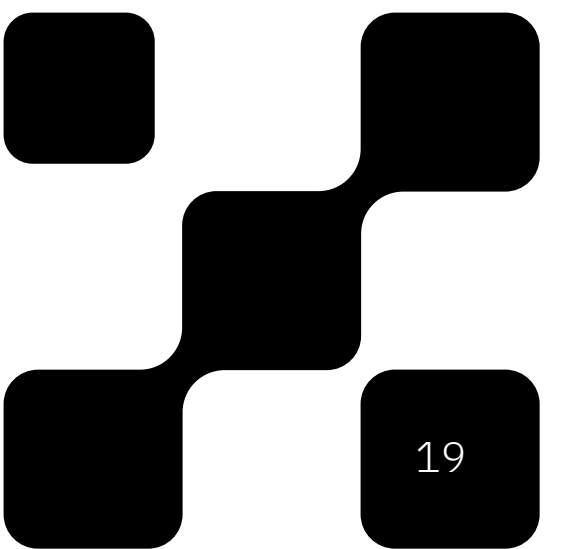
This is loyalty through excellence rather than loyalty through inertia. And it's defensible in ways that points-based programs are not, because the value is realized in the experience itself rather than in future redemption promises that competitors can simply outbid.

More fundamentally, agent-mediated coordination enables hotels to deliver on the promise that digital transformation has been making for three decades but has largely failed to realize: experiences that feel effortless, personally relevant, and emotionally resonant because they're built on genuine understanding rather than demographic segmentation. When that finally becomes operational reality rather than marketing aspiration, loyalty follows naturally.

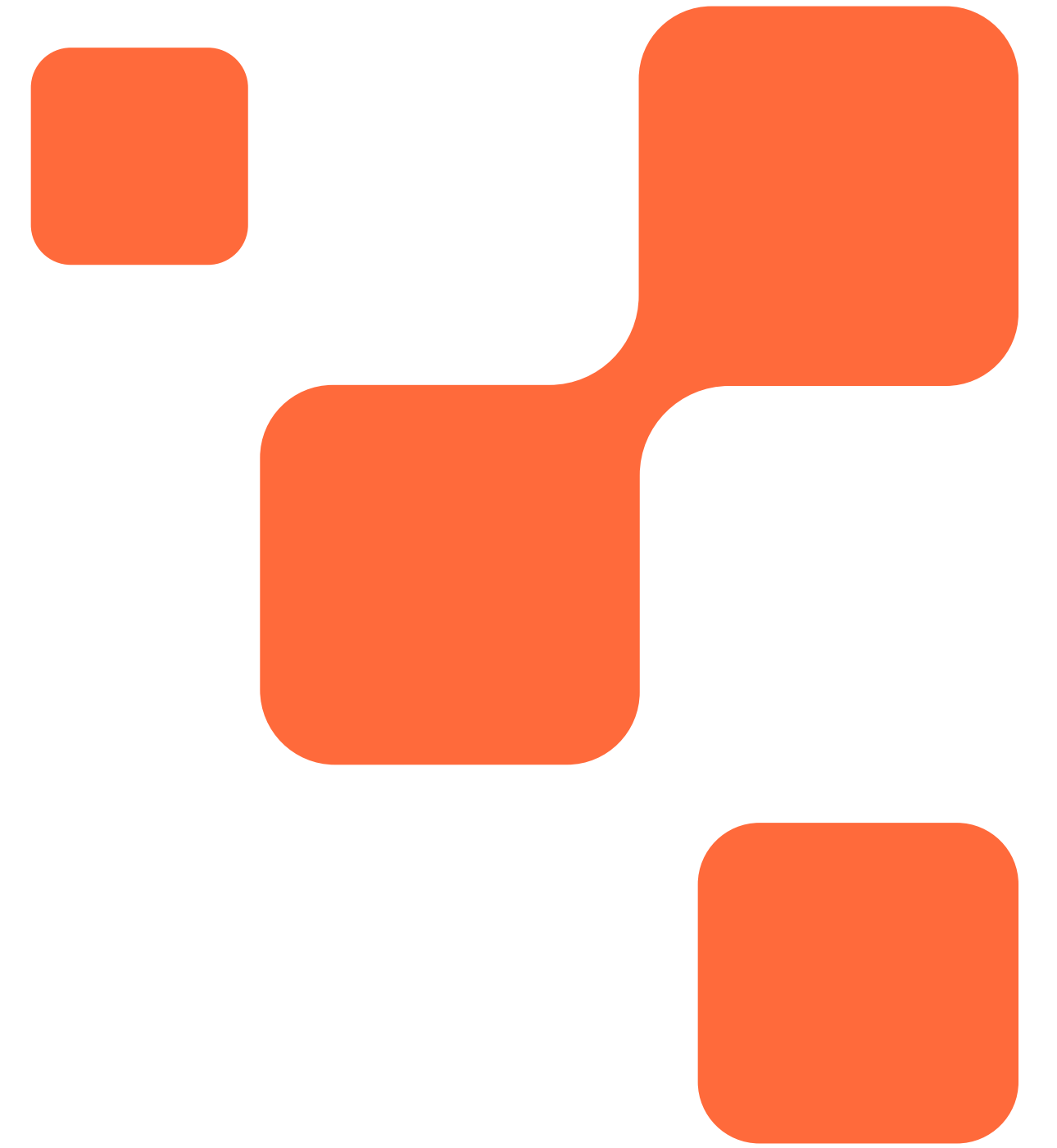
This isn't a fictitious future to industry leaders. As one executive noted when discussing autonomous AI agents: "You'll send your agent, and they'll send their agent, and they'll figure it out." Those who begin preparing now will shape how this ecosystem emerges rather than simply responding to it.



Technology in service of connection



Technology in service of connection



These strategic shifts represent an emerging reality. The window for proactive positioning is narrow. Success requires readiness across four dimensions:

01

Visibility readiness

As discovery shifts to curation, traditional SEO and a single content strategy becomes insufficient. Now is the time to audit how major platforms respond to queries about your properties. Implement structured data standards like llms.txt. Cultivate authentic, detailed guest testimonials as AI agents weigh recent specific advocacy far more heavily than aggregate scores. Monitor and correct misrepresentations before they compound.

02

Integration readiness

Agent-mediated booking require delivery on automated responses, but reality is stark. Major hotel groups operate with 600+ unintegrated data entry points. Front desk kiosks, property management systems, and booking engines often function separately. The issue of data & system fragmentation needs to be solved before an AI strategy is executed. Most AI projects are data projects requiring investment to connect existing systems. Map your integration landscape honestly. Prioritise orchestration layers enabling agent coordination. Establish API access and governance. Ensure technology investments support agent architectures as requirements, not afterthoughts.

03

Experience readiness

Tension between digital efficiency and human touch creates organisational debate, especially for luxury brands. Post-COVID staffing realities forced digital adoption and phone inquiries became unsustainable. But questions remain about which touchpoints should be automated versus elevated. Early adopters reveal guests value both digital check-in efficiency and human moments, when they matter. The false choice dissolves when technology handles predictable coordination, freeing staff for proactive connection. Map your journey through the connection lens. Define agent authority boundaries. Redesign roles so staff become cultural interpreters and relationship builders as agents handle administration.

04

Organisational readiness

The gap between board awareness and execution clarity is profound. Leadership knows AI matters, but strategic specificity evaporates when asked “what will you do?” Organisations face bottom-up experimentation without top-down roadmaps, as data infrastructure gaps prevent strategic planning. The cultural challenge, moving from legacy systems to agent-mediated operations, requires mindset shifts beyond technology. Security concerns compound this: employees use public ChatGPT despite data risks while proprietary tools limit functionality. Start with focused pilots building organisational muscle. Establish governance balancing security with innovation. Develop capabilities in agent behaviour design and performance monitoring.

The agent-mediated future isn't waiting for perfect clarity.

Now is not the time to wait for complete clarity. Now is the time to build capability through focused experimentation, positioning your brand as part of those who are shaping the ecosystem, not reacting to it. The brands establishing presence now, building integrations, and developing readiness now will shape the next decade of competitor dynamics. The transformation is underway. The main question is your organisations role in it.

We're helping Travel & Hospitality leaders assess their readiness across the four dimensions that matter:

01

Visibility readiness

How AI platforms currently represent your brand

02

Integration readiness

Your data architecture's ability to support agent coordination

03

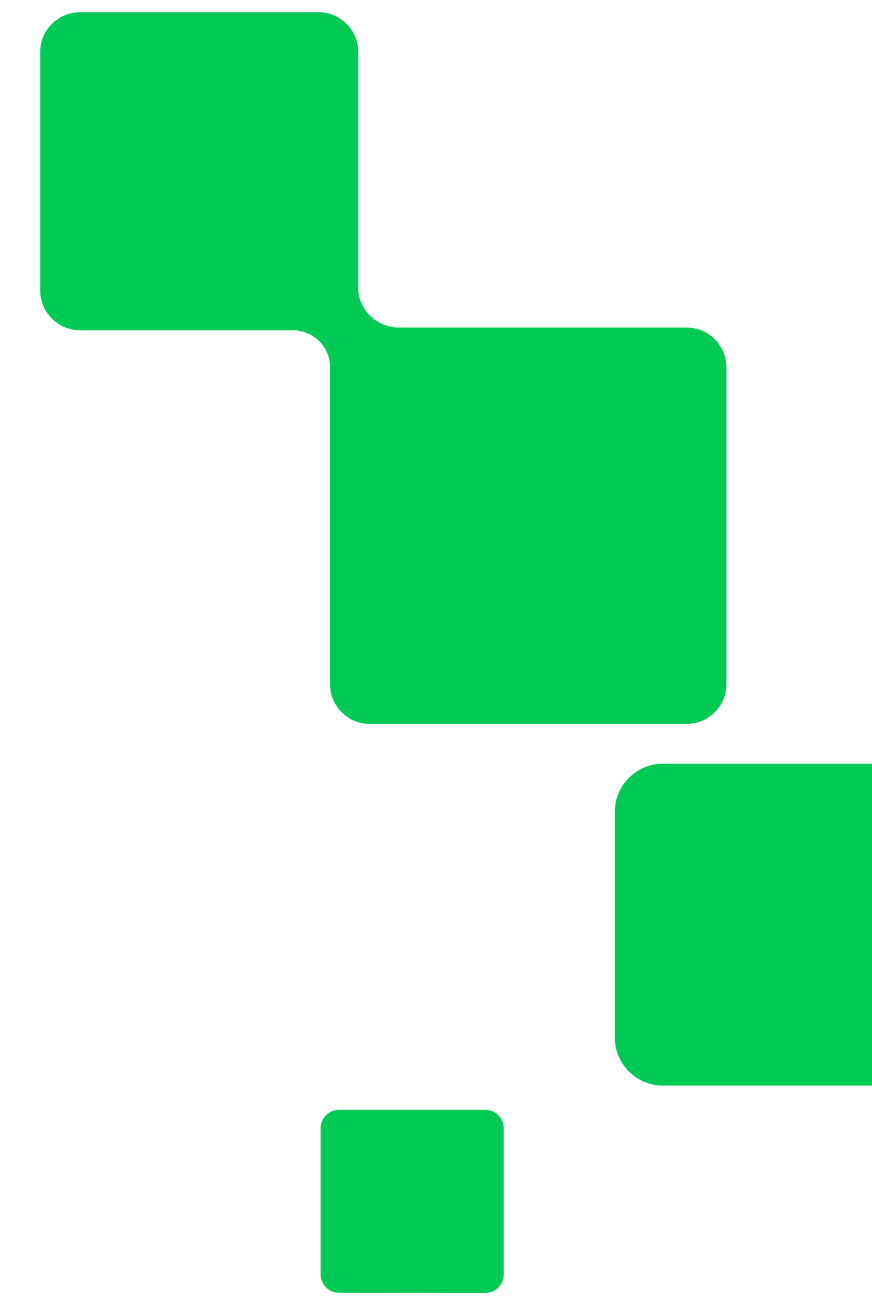
Experience readiness

Where technology should handle coordination vs. where human connection matters most

04

Organisational readiness

The capability gaps between AI awareness and execution



Book a readiness conversation



Chris Sheldon
Head of Business Development
chris.sheldon@msqdx.com



[@msqdx](#)