



TOURISE

Globant ▶

Tourism's AI TAKEOVER

Reinventing Travel through
Agentic Tourism



This report has been prepared in association with

KEARNEY

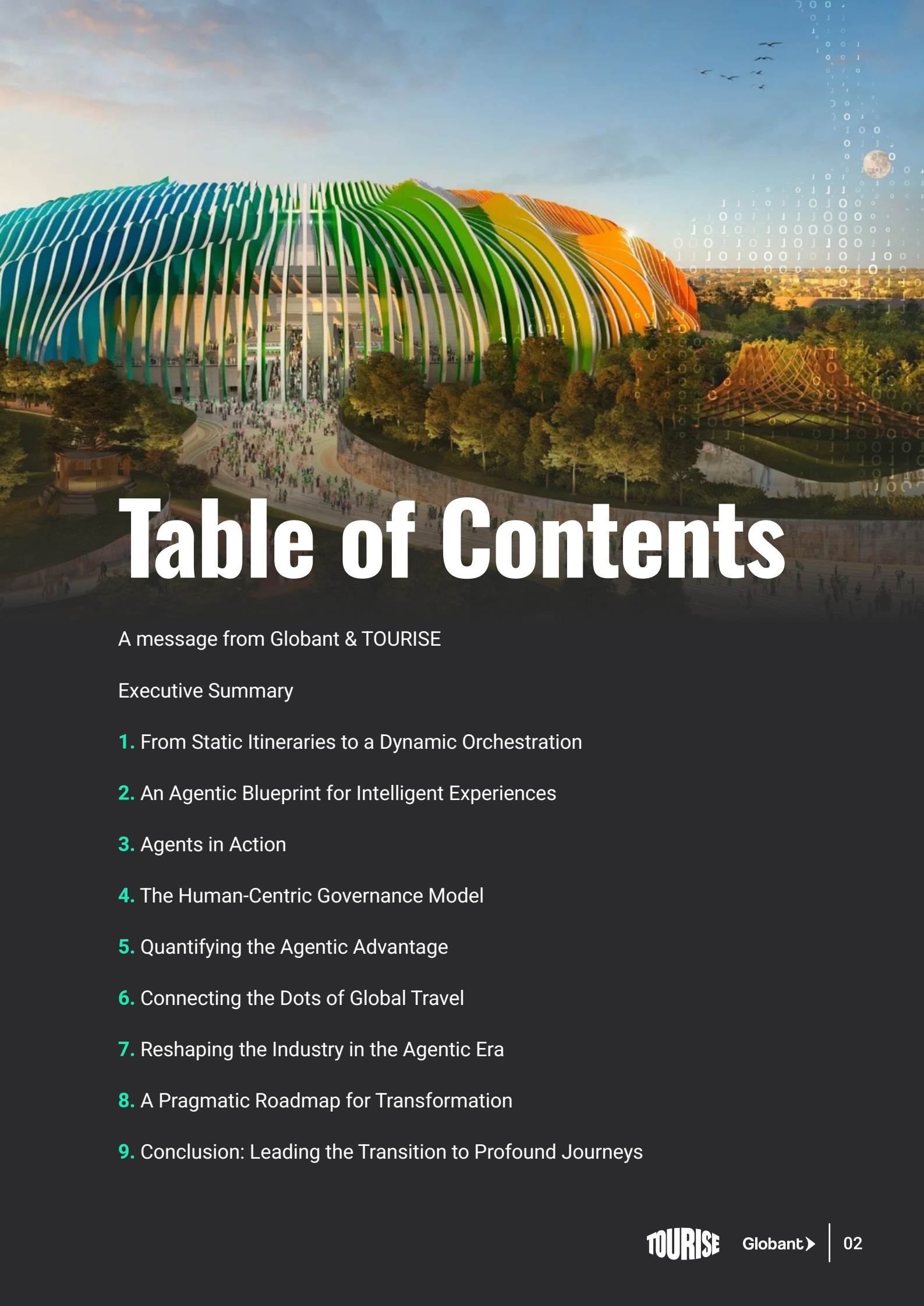


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**“A good traveler has no fixed plans
and is not intent on arriving.”**

Lao Tzu

Booked

July



18 19 20 21 22 23 24 25 26 27



Earth → Moon

22-31 July Premium

The ticket covers 2 way flight and a
3 night stay ay the Moonish Apts.



A message from TOURISE

The world of travel and tourism is entering a new era, one defined by transformative intelligence, personalization, and purpose. Today's travelers expect seamless, sustainable experiences with a deeply personal touch; meeting those aspirations demands bold, rapid innovation - not incremental change.

This technological shift must remain grounded in human connection, elevating - rather than replacing - the people who give travel its meaning: hosts, guides, creators, and local communities.

When rooted in authenticity, AI is redefining what is possible across the visitor economy. Intelligent itineraries craft journeys to individual preferences. Predictive platforms orchestrate flows at heritage sites to protect culture and nature. Multilingual companions provide guidance with cultural sensitivity. These tools do more than streamline logistics; they enrich experiences, strengthen resilience, and advance sustainability.

This shift is not abstract; in Saudi Arabia, for example, Vision 2030 is turning ambition into action. Projects like NEOM, the Red Sea, and Diriyah are living labs for AI-driven tourism. Biometric systems at airports speed arrivals while enhancing security, and NOURA - our AI companion - welcomes visitors in over 100 languages.

This is just the beginning of what AI can unlock, and we hope this paper inspires the global tourism community to continuously push the boundaries of possibility. At TOURISE, we are deeply committed to working alongside partners from every major economic sector and every corner of the globe. We invite you to explore these insights and join us in shaping a future of tourism, powered by innovation, guided by human agency, and grounded in meaningful connection.



H.E. Ahmed Al-Khateeb

Minister of Tourism, Saudi Arabia

Chairman, TOURISE and Chairman, TOURISE Advisory Board

A message from Globant

Tourism is standing at the same inflection point that every major industry faces today — where intelligence becomes a living part of every system, decision, and experience. Across the world, agentic AI is no longer a concept; it's an architecture reshaping how value is created, how choices are made, and how experiences evolve.

At Globant, we believe the future will belong to those who can orchestrate technology as seamlessly as they orchestrate human emotion. Agentic Tourism embodies this principle — transforming isolated innovations into interconnected, self-learning ecosystems where every interaction is meaningful and every journey is adaptive.

As governments, ministries, and enterprises embed AI into their decision-making fabric, the challenge will not be how much we automate, but how wisely we govern it. Intelligence without intention risks fragmentation; intention without intelligence limits impact. The future depends on balance — between precision and empathy, efficiency and imagination, automation and agency.

Globant's role in this journey is to build the bridges: interoperable platforms, trusted AI agents, and digital architectures that turn complexity into flow. Together with visionary partners like TOURISE and the Saudi Ministry of Tourism, we are helping define a new standard for how technology and humanity move in sync — creating travel ecosystems that are not only intelligent, but profoundly human.

The era of Agentic Tourism has begun. Its promise lies not just in smarter systems, but in more meaningful journeys — for travelers, communities, and the planet alike.



Martin Migoya

Co-founder and CEO of Globant

Executive Summary

Tourism is one of the world's great engines of prosperity and connection. **In 2024, it generated \$10.9 trillion — nearly 10% of global GDP — and supported hundreds of millions of jobs.**

By 2035, that figure is expected to reach
\$16.5 trillion.

Few industries touch so many lives, fuel so much commerce, and shape so much culture. Yet this very scale makes tourism uniquely vulnerable to disruption: travelers expect seamless experiences, operators face rising costs, and destinations are under pressure to grow while protecting communities and the planet.

This report calls for the adoption of Agentic Tourism, a new operating model designed to meet this challenge head-on. AI is rewriting the rules of every sector — from healthcare to finance — and tourism is no exception.

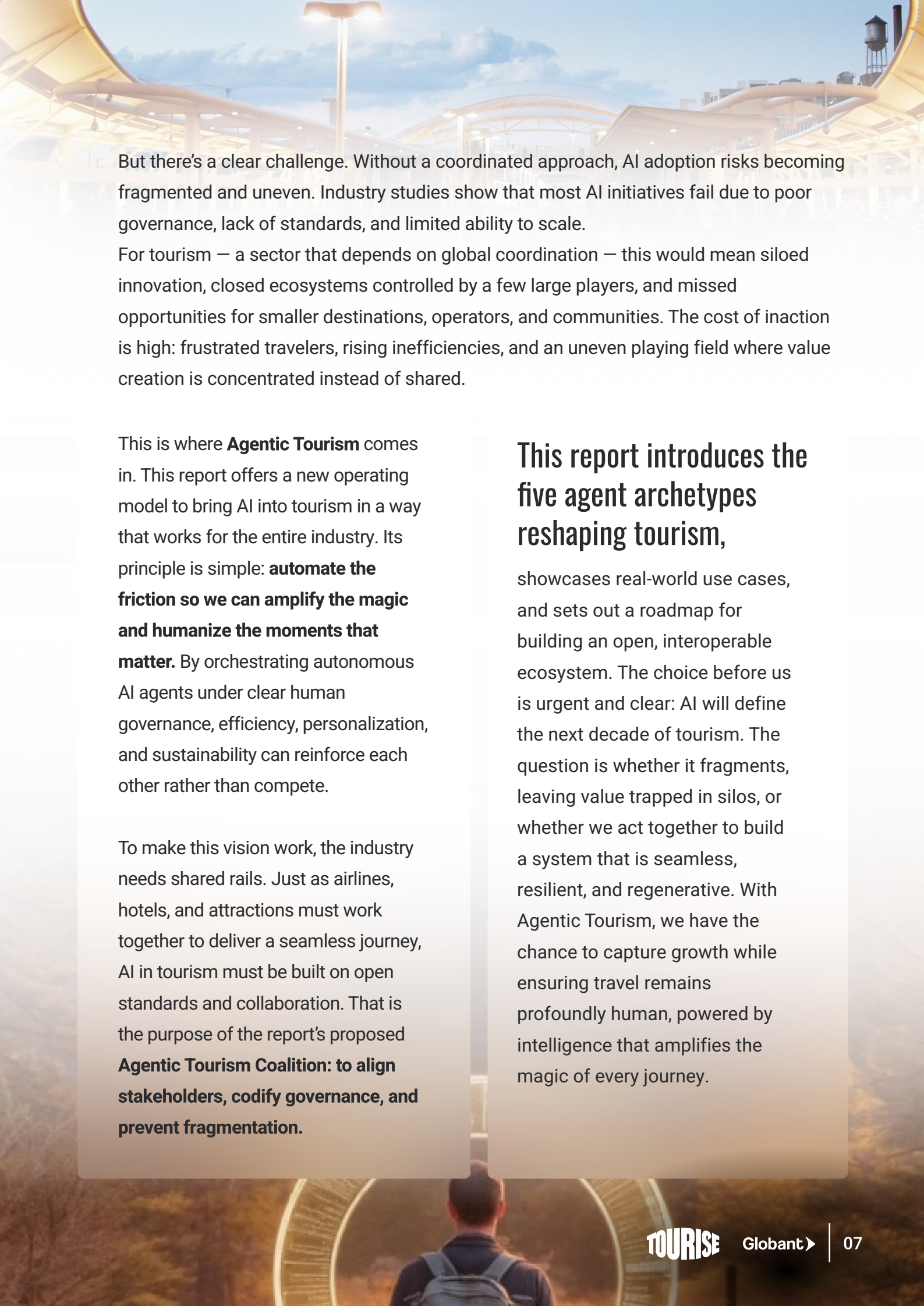
Already, the AI in Tourism market is projected to surge from USD 3.37 billion in 2024 to

USD 13.86 billion

by 2030, growing at an extraordinary **26.7% CAGR.**

AI now underpins everything from personalized trip planning to dynamic hotel pricing, from biometric border control to immersive cultural experiences.

The opportunity is immense: to reimagine how we design, deliver, and experience travel itself.



But there's a clear challenge. Without a coordinated approach, AI adoption risks becoming fragmented and uneven. Industry studies show that most AI initiatives fail due to poor governance, lack of standards, and limited ability to scale.

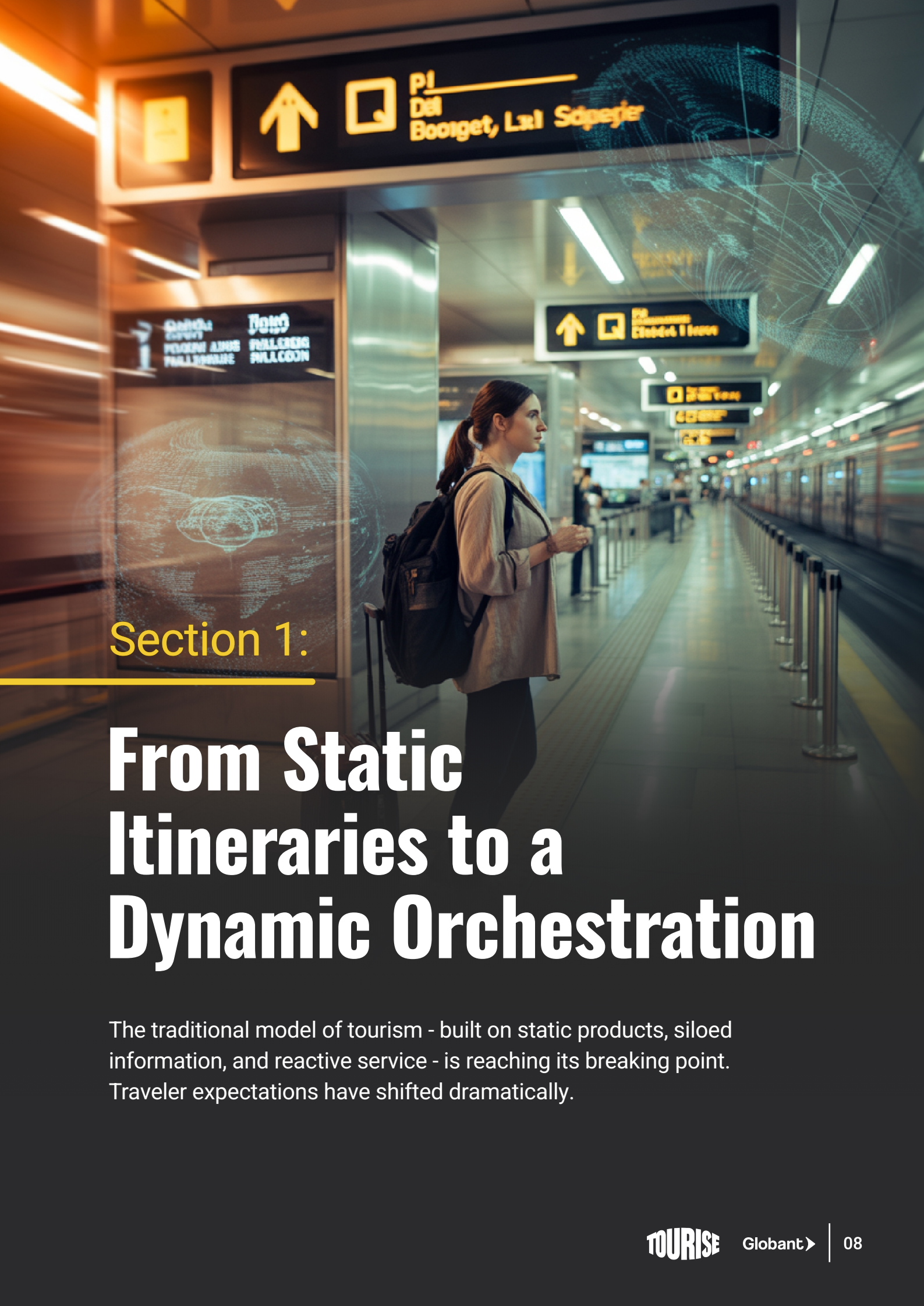
For tourism — a sector that depends on global coordination — this would mean siloed innovation, closed ecosystems controlled by a few large players, and missed opportunities for smaller destinations, operators, and communities. The cost of inaction is high: frustrated travelers, rising inefficiencies, and an uneven playing field where value creation is concentrated instead of shared.

This is where **Agentic Tourism** comes in. This report offers a new operating model to bring AI into tourism in a way that works for the entire industry. Its principle is simple: **automate the friction so we can amplify the magic and humanize the moments that matter**. By orchestrating autonomous AI agents under clear human governance, efficiency, personalization, and sustainability can reinforce each other rather than compete.

To make this vision work, the industry needs shared rails. Just as airlines, hotels, and attractions must work together to deliver a seamless journey, AI in tourism must be built on open standards and collaboration. That is the purpose of the report's proposed **Agentic Tourism Coalition: to align stakeholders, codify governance, and prevent fragmentation**.

This report introduces the five agent archetypes reshaping tourism,

showcases real-world use cases, and sets out a roadmap for building an open, interoperable ecosystem. The choice before us is urgent and clear: AI will define the next decade of tourism. The question is whether it fragments, leaving value trapped in silos, or whether we act together to build a system that is seamless, resilient, and regenerative. With Agentic Tourism, we have the chance to capture growth while ensuring travel remains profoundly human, powered by intelligence that amplifies the magic of every journey.

A woman with a backpack is standing on a train platform, looking towards the tracks. The platform has yellow directional signs and a digital display showing a globe. The background is a blurred train track with other passengers and lights.

Section 1:

From Static Itineraries to a Dynamic Orchestration

The traditional model of tourism - built on static products, siloed information, and reactive service - is reaching its breaking point. Traveler expectations have shifted dramatically.

68%

of travelers now say they will stay loyal to hotels that deliver standout personalized experiences

61%

are willing to pay more for them.

At the same time, the sector faces mounting sustainability pressures. Tourism already contributes nearly **8.8% of global greenhouse gas emissions**, growing at more than twice the rate of the wider economy, and by 2023 it still accounted for **6.5% of global emissions**. Against this backdrop, players within the industry must shift to dynamic, intelligent orchestration - adopting AI-driven systems that can meet rising expectations and embed responsibility at scale - if they are to avoid becoming obsolete. Agentic Tourism marks a necessary evolution to address these challenges, turning fragmented journeys into **connected, adaptive experiences**.

Graphic #1

AI Tools Take Center Stage in Research and Activity Planning¹

U.S. travelers are embracing AI to streamline and enhance their travel planning experiences, especially in the early stages. Two-thirds (67%) intend to use AI tools for destination research, followed closely by 56% to plan activities and attractions. Functional tasks such as booking flights (48%) and choosing accommodations (44%) are also strong use cases. However, when it comes to on-the-ground decisions like getting local recommendations, usage drops to just 28%, signaling a gap between planning journeys and in-destination spontaneity that AI tools have yet to fully bridge.

Top Uses of AI in Travel: Researching Destinations

Percentage of travelers using AI for different purposes (by region)

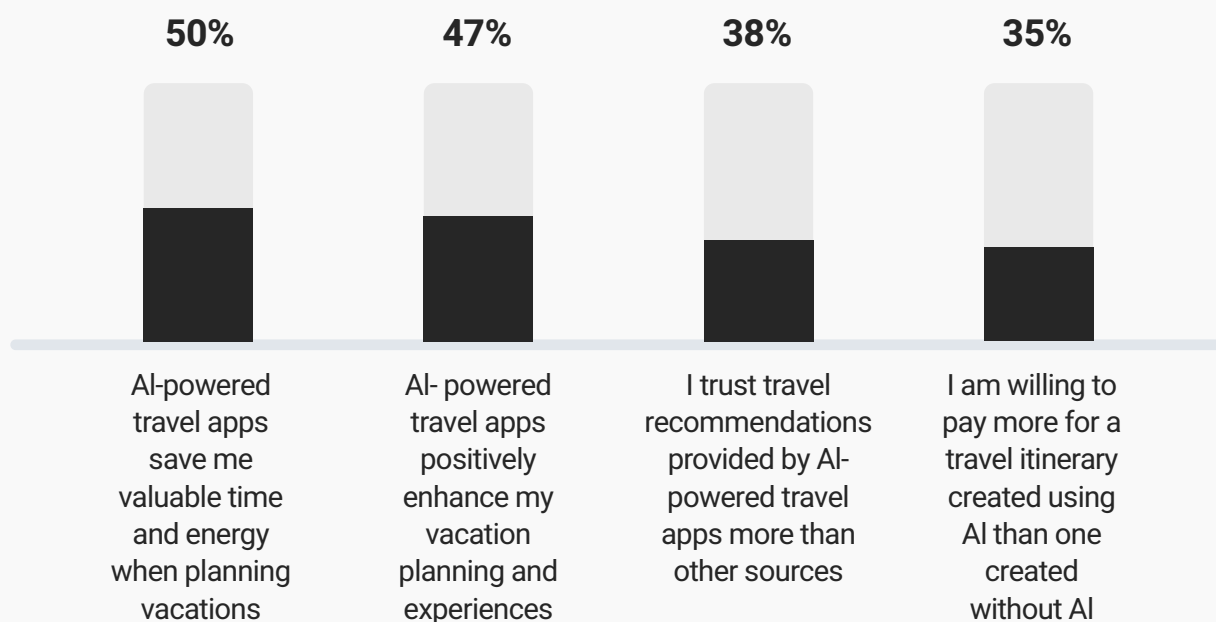


¹ Skift State of Travel 2025

The shift is already underway. **40% of global travelers have used AI-based tools to plan their trips**, and **62% are open to using them in the future** (Kantar). These tools stand out for their ability to suggest tailored itineraries — from accommodations and transport to activities and dining — based on individual preferences. In corporate travel, adoption is even more pronounced: according to the 2025 State of AI in Corporate Travel report, **90% of organizations already use AI, with primary goals of cost savings (71%), enhanced traveler experiences (68%), and improved data analysis (63%)**. Most notably, **52% say AI has exceeded expectations, while another 45% report it is meeting them**.

Graphic #2²

How technology is transforming the way we travel³



These data points reveal a clear truth: AI in tourism is not a future possibility — it is already here, shaping how travelers plan and how providers compete. But what we have today remains fragmented. Isolated tools personalize parts of the journey, but they do not yet work together to create the seamless, adaptive experiences travelers increasingly demand.

² Skift State of Travel 2025

³ When Machine Meets Wanderlust: The role AI plays in tourism. Kantar.

<https://www.kantar.com/inspiration/research-services/the-role-ai-plays-in-tourism-pf>

Now imagine a connected world where a **guest-owned AI** requests a trip tailored to budget and preferences; an **airline agent** responds with flights and disruption protocols; a **hotel agent** adds rooms, perks, and sustainability options; and a **destination agent** coordinates ground transportation, events, and local policies. This is not science fiction — it is what multi-agent collaboration looks like in the **Agentic Tourism Era**.

This is where our proposed operating model becomes vital. The industry has the consumer demand, the technology, and the business case. What it lacks is a framework to unify these capabilities across borders and stakeholders. That is why this report calls for the adoption of Agentic Tourism — a model designed to transform isolated advances into an interoperable ecosystem that is seamless, resilient, and regenerative.

Infographic #1

The Evolution of Tourism

The Old Model



Static
Products



Siloed
Information

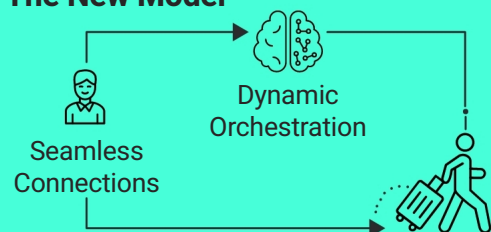


Stressed
Staff



Fragmented
Path

The New Model



Tourism must evolve: from reactive transactions to intelligent, agentic orchestration



Digitize the Expected

Automate logistics so humans can focus on emotions and the unexpected.



Create Profound Journeys

Travel isn't transit- it's about inspiration, learning and memory-making.



Own the End-to-End Journey

Deliver "best seat everywhere you go" across all providers' touchpoints.



Deliver Seamless Flow

Shift from "one-stop shop" to "no-stop shop" needs anticipated issues resolved before they arise.



Under-Promise, Over-Deliver

Exceed expectations by flawlessly automating the basics, leaving space for surprise and delight.

1.1 Defining Agentic Tourism

Agentic Tourism is an operating model that applies autonomous AI agents to the visitor economy. Each agent is defined by four components:

Goals: Human-defined objectives, from simple (find the lowest fare) to complex (maximize NPS within budget).

Tools: Access to digital tools such as APIs, payment systems, workforce platforms, and IoT data.

Policies: Operation under a set of policies or rules that act as guardrails for brand standards, business rules, safety, and ethics.

Capabilities: Ability to perceive, reason, plan, act, and learn from outcomes to improve future performance.

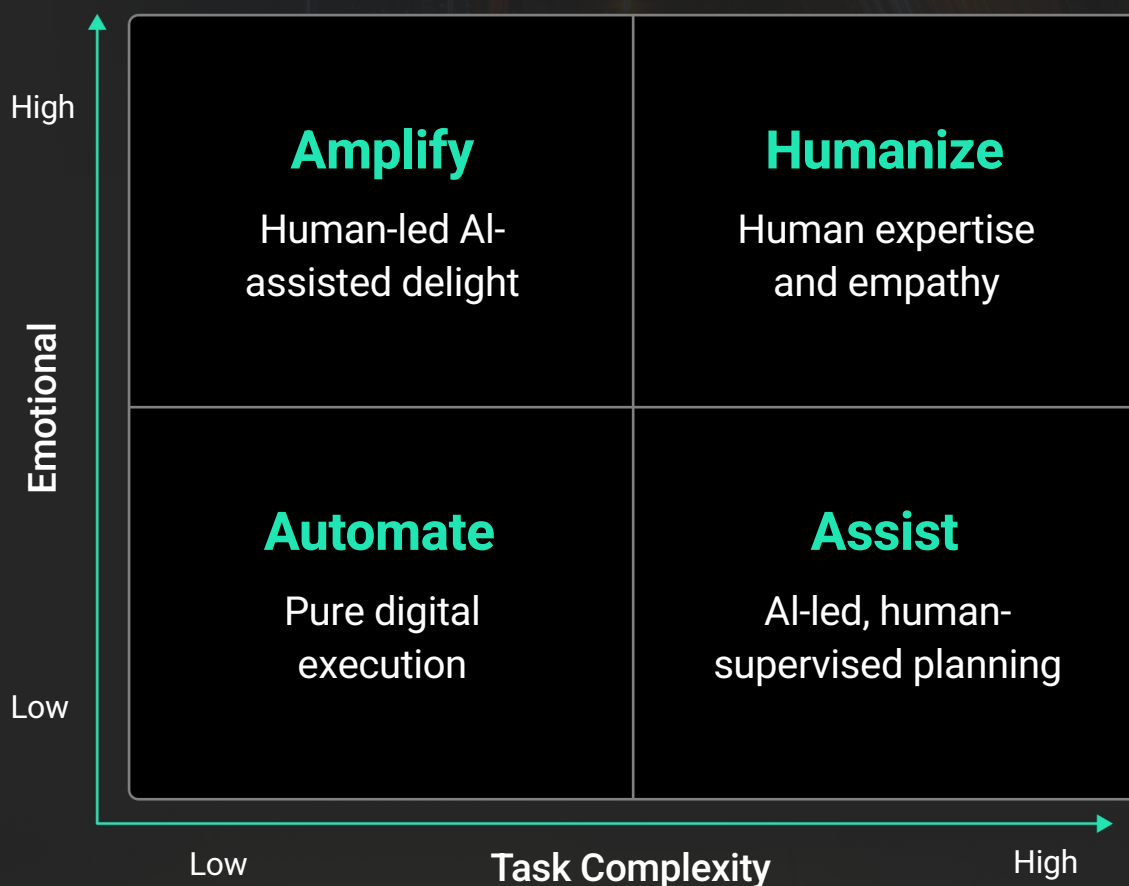
Crucially, these agents operate under human-in-the-loop governance, ensuring accountability and alignment with organizational values. They are viable today due to the convergence of three distinct yet deeply interconnected technological and social trends. **Data & Connectivity** from sources like IoT sensors and digital identity; the massive **AI Capability Leap** driven by foundation models that can understand, reason, and act; and the **Human-Centric Imperative**, which recognizes that these agents are most valuable when they augment, not replace, human talent.



1.2 Our Framework for Intelligent Experiences

The central challenge of the agentic age is not choosing between technology and people, but understanding how to combine them. The following framework offers a clear, strategic logic for allocating tasks between AI agents and human experts based on two simple axes: task complexity and emotional significance. This matrix resolves the tension between efficiency and empathy, providing a blueprint for designing services that are both flawlessly executed and deeply human.

Infographic #2



This framework is not just an operational tool but a new theory of value creation. The travel brands that succeed will use automation to remove friction, enabling their teams to focus on the high-impact moments that build loyalty and competitive edge.

1.3 Examples of the Framework in Action

This shift is already underway, with market leaders showing how the right balance of automation and human touch can transform the travel experience and create magic.

Disney's Digital Ecosystem

Disney shows what happens when friction fades into the background. From payments to ride reservations, queues to guest flows, the entire park experience is streamlined so visitors spend less time waiting and more time exploring shops, restaurants, and attractions. As one guest described it: "A 35-minute wait felt like a 15-minute wait."

There's more to IoT, machine learning, and AI than convenience in the digital ecosystem. **Disney's MagicBand not only:**

Cut turnstile
transaction
time by

30%

unlocked growth
resulting in

20%
profit increase

285%

rise in
conversion rates

5,000

additional
visitors per day

Just as importantly, it freed cast members to do what they do best—sparking surprise encounters, creating magical moments, and elevating satisfaction in ways that drive repeat visits and higher per-capita spend.



INTUIT DOME

LA Clippers' Intuit Dome

At the Intuit Dome, Globant powered an integrated layer of automation that redefines how a venue operates. Smart parking, dynamic wayfinding, the Fan App, and the Zoom Thru Band make entry effortless, payments cashless, and logistics invisible.

Checkout-free stores alone have driven a



41%
increase in retail conversion,



as fans return more frequently and make more purchases.

The design isn't about efficiency alone; it's about redirecting human energy. By removing friction from ticketing, access, and transactions, staff are no longer confined to counters or cash registers. Instead, they act as hosts—amplifying joy, guiding high-energy fan moments, and stepping in with empathy when needed. Fans arrive earlier, stay longer, and engage more.

The Global Opportunity

These examples are not isolated: across the \$10.9 trillion Travel & Tourism sector, the same pattern is emerging. According to WTTC, the industry contributed around:

10% of the world's GDP in 2024 and is forecast to reach

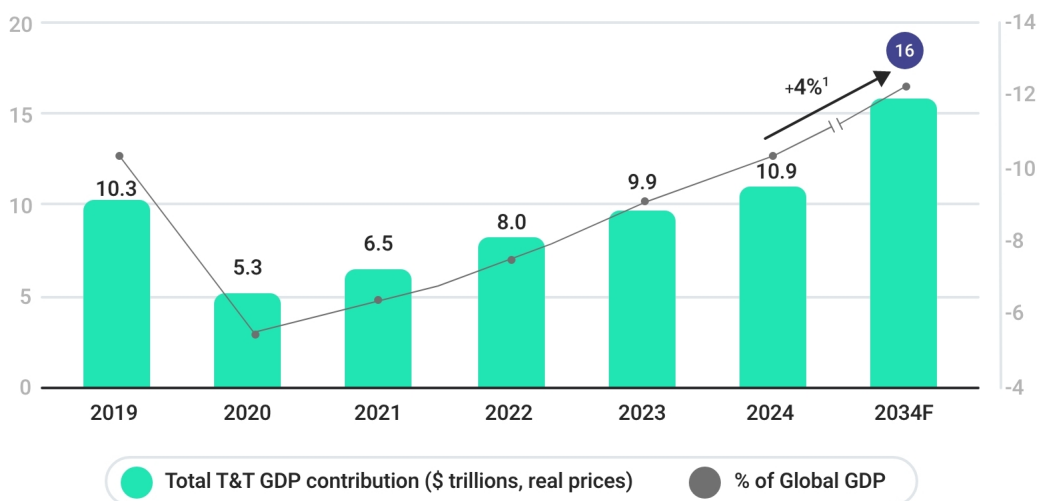
\$16.5 trillion
by 2035, supporting

more than
\$460 million
jobs worldwide.

International visitor spending grew by over 11% in 2024 alone, reaching nearly \$1.9 trillion.

When friction disappears, satisfaction and revenue rise together. This is the essence of Agentic Tourism: Artificial Intelligence handles the routine so humans can focus on creating delight, building trust, and fostering loyalty. As Disney and the Intuit Dome show, this is not just a vision—it's already delivering measurable returns in one of the fastest-growing engines of the global economy.

Travel & Tourism Contribution to GDP 2019-2034



Note 1. Compound annual growth rate (CAGR): F=forecast.
Source: WTTC²⁴

Travel and Tourism at a Turning Point: Principles for Transformative Growth

Section 2:

An Agentic Blueprint for Intelligent Experiences



2.1 Five Pillars of the Agentic Experience

The architecture of Agentic Tourism is built upon five interoperable agent archetypes, each designed to enhance a critical part of the traveler journey. They work as a connected, intelligent system, orchestrating the experience to fulfill the promise of automating friction while amplifying magic. These five pillars are able to create a holistic experience of what the future travel could look like.

Table #1

Meet the Five Archetypes of Agentic Tourism

Agent Archetype: Experience Maximizer 	• Core Mandate Curate, anticipate, and resolve issues for the individual traveler. • Primary Framework Quadrant(s) Assist, Amplify • Primary KPIs Conversion Rate (CVR), Average Order Value (AOV), Ancillary Attach Rate, Net Promoter Score (NPS).	• Key Functions Personalized planning, dynamic itinerary adjustment, proactive disruption management, automated rebooking. • Strategic Value Drives top-line revenue growth and enhances guest loyalty through hyper-personalization at scale.
Agent Archetype: Operations Optimizer 	• Core Mandate Sense, predict, and rebalance operational resources in real-time. • Primary Framework Quadrant(s) Automate • Primary KPIs Average/P95 Wait Time, Throughput, Labor Utilization, Mean Time to Resolution (MTTR).	• Key Functions Queue detection, demand forecasting, dynamic staff redeployment, asset utilization, proactive guest notifications. • Strategic Value Improves operational efficiency, reduces costs, and creates a seamless, frictionless guest experience.

Agent
Archetype:
**Regeneration
Guardian**



- **Core Mandate**

Measure, nudge, and reward sustainable and regenerative choices.

- **Primary Framework Quadrant(s)**

Automate, Assist.

- **Key Functions**

CO2 impact calculation, eco-vendor rating, local sourcing promotion, nudging toward lower-impact options.

- **Strategic Value**

Embeds sustainability into the core operation, meets consumer demand for responsible travel, and builds brand reputation.

- **Primary KPIs**

Eco-option Share, tCO2 Saved per Itinerary, Local/Community Vendor Spend Share.

Agent
Archetype:
Wellness Agent



- **Core Mandate**

Protect, pace, and personalize traveler wellbeing.

- **Primary Framework Quadrant(s)**

Automate, Humanize (Escalation)

- **Key Functions**

Context-aware health nudges (hydration, pacing), environmental alerts (heat, air quality), wellness service recommendations.

- **Strategic Value**

Enhances guest safety and wellbeing, reduces risk, and opens new revenue streams in the wellness category.

- **Primary KPIs**

Wellness Nudge Engagement, Health/Safety Alert Acknowledgment, Reduction in Health Incidents.

Agent
Archetype:
**Opportunity
Connector**



- **Core Mandate**

Transform visits into tangible economic and professional value.

- **Primary Framework Quadrant(s)**

Assist.

- **Key Functions**

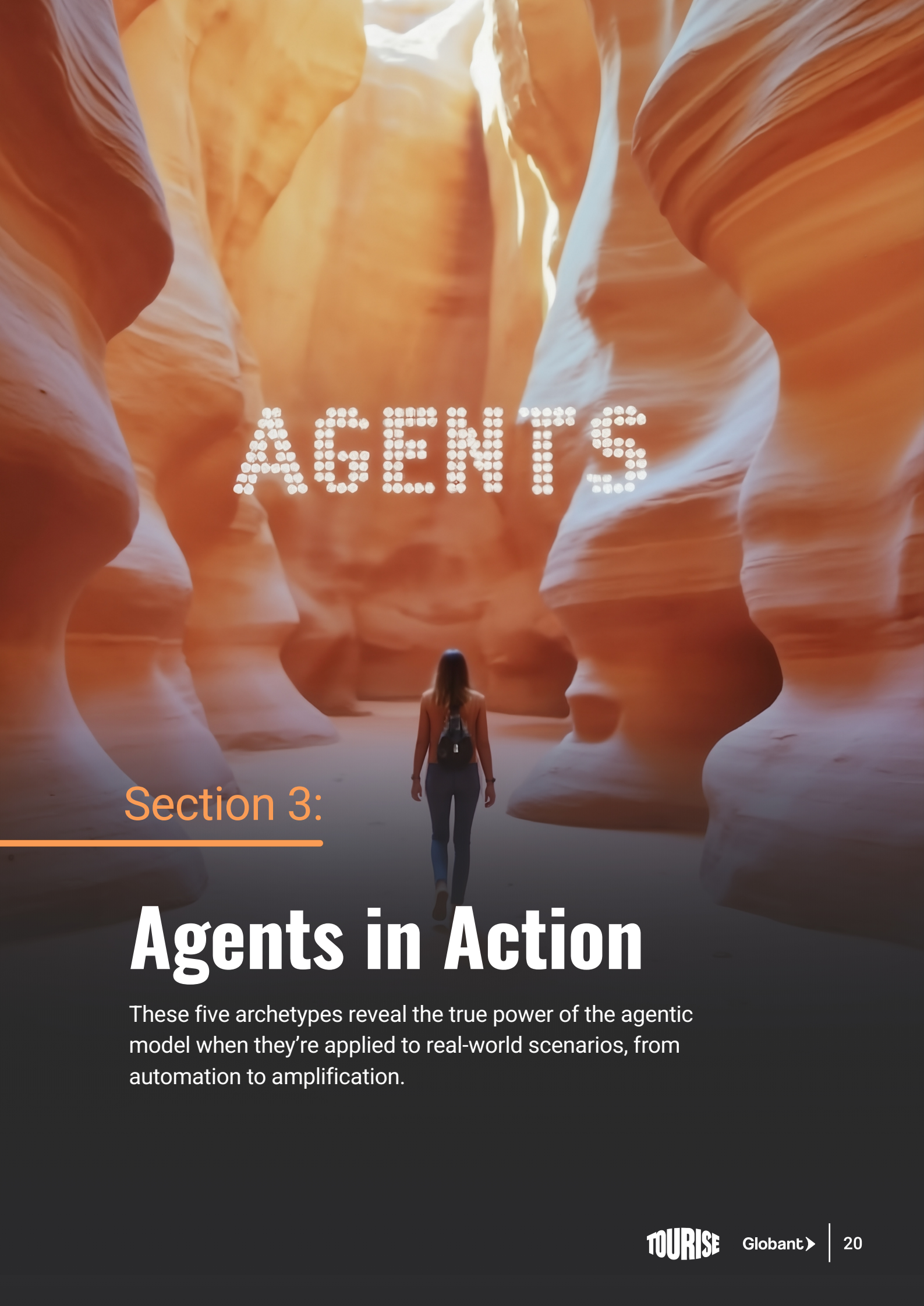
Stakeholder matching, B2B networking, event discovery, targeted introduction facilitation.

- **Strategic Value**

Creates new value for business travelers and strengthens the destination's economic development proposition.

- **Primary KPIs**

Qualified Matches, Meetings Set/Kept, Business Pipeline Value from Visits.

A person with a backpack is walking away from the viewer down a narrow, brightly lit slot canyon. The walls of the canyon are smooth and curved, with warm orange and yellow light filtering through from above. The word "AGENTS" is displayed in a large, white, dot-matrix font across the upper middle of the image.

AGENTS

Section 3:

Agents in Action

These five archetypes reveal the true power of the agentic model when they're applied to real-world scenarios, from automation to amplification.



3.1 The Art of Hyper-Personalization at Scale with the Experience Maximizer Agent

The Experience Maximizer is the guest-facing agent that delivers true one-to-one personalization at scale. It ingests a wide range of signals, from past behavior and loyalty status to real-time context like weather or crowd density, to design journeys that adapt in the moment. Beyond acting as an intelligent trip planner, it proactively manages disruptions, automates rebookings, and creates opportunities for staff to deliver thoughtful, high-touch service, often before the guest is even aware of a problem.

Consider a couple celebrating their anniversary at a luxury resort. Knowing their preference for Italian cuisine and outdoor dining, the agent secures a terrace table under clear skies, surprising them at check-in. Later, when sudden winds make the terrace less ideal, it seamlessly shifts the reservation to a romantic courtyard, updates the system, and equips the concierge with a personalized script.

Airlines like **KLM** already use AI-driven chatbots to handle up to 50% of inquiries automatically, freeing staff to focus on complex, high-value interactions while boosting NPS scores by five points. Online travel platforms like **Expedia** and **Klook** leverage AI personalization to predict demand and recommend trips, with Expedia reporting 20% better forecast accuracy and Klook achieving a 30% uplift in booking conversions.



“

When journeys are personalized in real time, travelers book more, spend more, and stay more loyal.”



Value Unlocked:

- 01 **Higher Conversion Rates (CVR):** Personalized options remove friction in booking.
- 02 **Increased Ancillary Revenue (AOV):** Relevant, timely recommendations drive up-sell.
- 03 **Boosted Loyalty & NPS:** Consistent, delightful experiences strengthen retention.
- 04 **Reduced Service Costs:** Proactive fixes cut refunds and service recovery needs.

3.2 Operations Optimizer: The Engine of Automation

This Agent focuses on the behind-the-scenes flow of resources, ensuring the right staff, assets, and services are in the right place at the right time. Unlike passive dashboards that only flag issues, this agent actively proposes multi-part solutions for supervisors' one-click approval, helping smooth demand surges, reduce bottlenecks, and keep operations balanced.

At a theme park, for example, when the “Cosmic Coaster” suddenly faces a 45-minute wait, the Operations Optimizer can instantly propose fixes: send fast-pass offers for nearby rides, reopen a second loading station with redeployed staff, and adjust shuttle frequency to ease congestion. What could have been a frustrating delay becomes a smoother, more enjoyable experience.

This logic scales across the industry. Disney Parks use predictive analytics to rebalance guest flows and reduce wait times. Other examples can be found in mid-sized business hotels

that have improved occupancy and guest satisfaction with AI-powered pricing and service bots, while global hotel chains have lifted both revenue and efficiency through dynamic resource allocation. Papua New Guinea Immigration has applied the same principle to national borders: an AI-powered e-visa system now automates routine approvals while personalizing traveler access, cutting processing from two weeks to two minutes for most applications. And in major airports like Singapore, biometric AI accelerates security screening by up to 40%, improving both safety and traveler comfort.

“

Shorter waits, smarter staffing, faster approvals, and operations that feel invisible to the traveler.”

Value Unlocked:

- 01 Reduced average & 95th-percentile (P95) wait times, translating into higher satisfaction.
- 02 Improved labor utilization & asset throughput.
- 03 Faster resolution of incidents (lower Mean Time to Resolution).



3.3 The Regeneration Guardian: Weaving Sustainability into Every Choice

The Regeneration Guardian ensures sustainability is not an afterthought but woven into every travel decision. From booking transport to choosing dining options, it calculates and displays the environmental and social impact in ways that are simple, transparent, and rewarding.

Picture a family booking a day tour. Next to each option, clear “Impact Scores” appear: a diesel bus tour at 5.2 kg CO₂ per person versus an e-bike tour at just 0.3 kg. The greener choice is flagged with a “Saves 4.9 kg CO₂” badge and a “Local Champion” icon for supporting community-owned businesses. If a tour risks damaging a protected reserve during breeding season, the agent automatically blocks it and suggests an alternative. Sustainability becomes not a compromise, but an easy and rewarding default.

This logic is already visible across the industry. **The Louvre’s “Leonardo” AI assistant** guides visitors along personalized routes that reduce pressure on sensitive artworks while enhancing guest experiences. In hospitality, mid-sized hotels using AI nudges have increased eco-friendly vendor bookings and cut operational costs—proving that what’s better for the planet can also be better for business.

“

Sustainability can't be an afterthought—it must be embedded into every booking and every choice.”

Value Unlocked:

- 01 Higher share of eco-friendly bookings.
- 02 Tons of CO₂ saved, tracked at scale.
- 03 Greater revenue directed to certified local vendors.

3.4 Prioritizing Traveler Wellbeing in Real-Time with the Wellness Agent

The Wellness Agent acts as a proactive, context-aware health companion, delivering personalized interventions. With explicit user consent, it combines wearable, itinerary, and environmental data to provide relevant nudges for pacing, hydration, sun exposure, and even meal choices. The final goal is to keep guests safe, comfortable, and energized.

On a hot summer day, a tourist's smartwatch shows an elevated heart rate while weather data confirms high heat and moderate air quality.

The Wellness Agent sends a gentle, non-intrusive push notification: "The heat index is currently very high. It looks like you've been in direct sunlight for a while. There is a shaded public garden with a drinking fountain just 200 meters from your current location. It might be a good time for a short break and to rehydrate." The agent could also be configured to follow up later that day, noting the guest's high activity level, and proactively suggest booking a recovery session at the hotel's spa, presenting available time slots directly in the app.

“

The result is safer, more energized travelers who associate destinations and brands with care and trust.”

Value Unlocked:

- 01 Higher engagement with wellness nudges.
- 02 Reduced health incidents (e.g., dehydration, heat exhaustion).
- 03 Lower liability risk for operators.

3.5 Transforming Visits into Value with The Opportunity Connector

Targeted at business, academic, and “bleisure” travelers, The Opportunity Connector transforms trips into engines for professional and economic value by surfacing and facilitating high-impact connections. With the traveler’s consent to access their professional profile (e.g., LinkedIn), it scans the landscape of a destination—conference attendee lists, local business directories, university research forums, public tenders—to find and facilitate relevant opportunities.

Travel isn’t only about leisure—it’s also about connections, knowledge exchange, and economic growth. At a medical conference, the Opportunity Connector, having analyzed a biotech’s executive professional background in oncology drug development, identifies three key matches: a venture capitalist investing in oncology startups, a research team presenting a relevant biomarker, and a local incubator launching a new collaboration program. It proposes pre-drafted introductions and even schedules a short coffee meeting, turning a standard trip into a catalyst for partnerships and growth.

“

A trip becomes more than a visit; it becomes a catalyst for collaboration, commerce, and innovation.”

Value Unlocked:

- 01 More qualified matches & meetings.
- 02 Stronger business pipelines for visitors.
- 03 Tangible economic growth for Convention and Visitors Bureaus (CVBs) and DMOs.

3.6 Orchestrating Archetypes: When Agents Work Together

The true potential of Agentic AI lies not just in the strength of individual agents, but in the orchestration of multiple archetypes working in concert. When seamlessly combined, they elevate both guest experience and operator resilience to new heights.

Experience Maximizer



Curates a personalized itinerary for a biotech executive attending a global congress in Riyadh, including flights, hotel, and recommended cultural excursions.



[View Detail](#)

Run Agent

Operations Optimizer



Monitors real-time airport congestion and rebooks the traveler's connecting flight after a delay, while also adjusting hotel check-in and transport reservations automatically.



[View Detail](#)

Run Agent

Opportunity Connector



Identifies three relevant business contacts at the congress and schedules coffee introductions, factoring in the executive's newly shifted agenda.



[View Detail](#)

Run Agent

As the traveler moves through the journey, the agents continuously exchange context: the itinerary adapts to operational realities, business meetings align with updated schedules, and personal preferences are respected throughout. The outcome:



Saved 6 hours of potential delay disruptions.

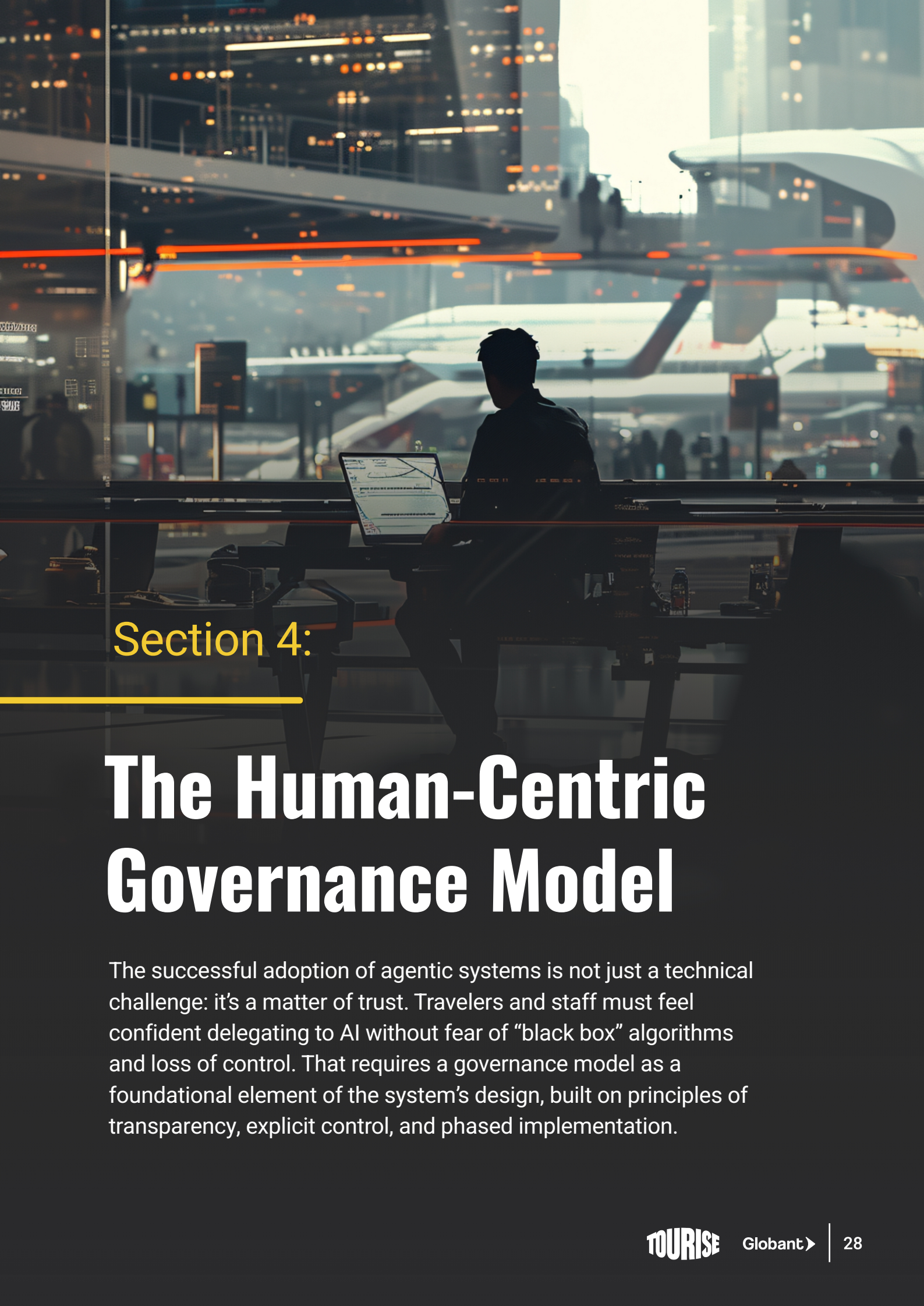


Secured 3 high-value business meetings.



Improved NPS by an estimated 15 points vs. baseline.

This orchestration illustrates how the agents, when interconnected, create a living, adaptive system where the traveler's experience is continuously optimized end-to-end. It transforms fragmented services into a cohesive, intelligent journey.

A person is seen from behind, sitting at a desk in a control room, working on a laptop. The room has large windows overlooking a city skyline at night, with lights from buildings and a bridge visible. The person is wearing a headset and looking at the laptop screen, which displays some data or maps. The overall atmosphere is professional and high-tech.

Section 4:

The Human-Centric Governance Model

The successful adoption of agentic systems is not just a technical challenge: it's a matter of trust. Travelers and staff must feel confident delegating to AI without fear of “black box” algorithms and loss of control. That requires a governance model as a foundational element of the system's design, built on principles of transparency, explicit control, and phased implementation.

4.1 The Trust Ladder: A Phased Approach to Autonomy

To help travelers and staff grow comfortable with increasing levels of autonomy, organizations should adopt a phased approach. The Trust Ladder is a practical tool for managing a user's journey through our Intelligent Experiences Framework, allowing them to choose the level of delegation they are comfortable with at any given time. Each rung represents a greater degree of delegated control, progressively earning the user's confidence.

Stage 1

Advisory-only



The agent acts as a research assistant. It provides options and analysis, but the human makes 100% of the decisions and executes all actions. This is pure **Human** control.

Stage 2

Suggest + Undo Window



The agent proactively takes a low-risk, easily reversible action, such as placing a 10-minute hold on a restaurant table. The human has a time-limited window to cancel. This is the first step into the **Automate** quadrant for simple, no-consequence tasks.

Stage 3

Low-risk Autonomy



The agent acts automatically on pre-approved, "no-brainer" tasks where there is no penalty for the action, such as swapping a museum ticket for a less crowded time slot. The human is notified and can override. This deepens engagement with the **Automate** quadrant.

Stage 4

High-stakes with Confirmation:



The agent performs all the complex planning but requires a final "tap-to-confirm" from a human for any action with significant financial, safety, or personal implications (e.g., approving a flight change with a fee). This is the primary gatekeeper for the **Assist** quadrant.

Stage 5

Personal AI Hand-off



The user grants their personal agent full autonomy to negotiate and execute actions on their behalf based on high-level goals and constraints. The guest's agent communicates its intent to a destination's agent, which responds with compliant offers. This represents full trust in agent-to-agent **Automation** and **Assistance**.



This phased approach allows the system to demonstrate its value and reliability at each stage, building the user's confidence and willingness to climb to the next rung.

4.2 The Delegation Contract: Codifying the Rules of Engagement

If the Trust Ladder defines the process of building trust, the Delegation Contract provides the core **instrument** of governance. It is a clear, machine-readable, and human-auditable set of guardrails that governs every action an agent can take. Far from vague terms of service, it is a precise technical and operational specification that removes ambiguity and establishes clear boundaries for autonomous control. Key clauses include:

Action Scopes

Defines what an agent is permitted to do. Example: placing soft holds on a restaurant table is allowed, but confirming payment always requires approval.

Risk Thresholds

Sets quantifiable limits on autonomous actions. Example: never auto-book a hotel above \$200/night, or never accept a non-refundable fee over \$50.

Approval Gates

Explicitly identifies when a “human-in-the-loop” is required, linking directly to the stages of the Trust Ladder. Example: auto-swap a museum ticket if there’s no penalty, but request confirmation if there’s a cost involved.

Escalation Triggers

Specifies conditions under which an agent must cease autonomous action and escalate to a human expert. Example: medical issues, VIP guests, or low-confidence data always trigger human review.

Auditability

Ensures every action is logged and can be explained in plain language, reinforcing the principle of explainability. Example: “We swapped your reservation because the system detected a 90% chance of heavy rain during your scheduled outdoor tour.”

Each brand will customize its contract based on its objectives. A luxury hotel might allow very little automation, ensuring that every action reflects its promise of personalized, human-led service. A low-cost airline, by contrast, may push high automation to maximize efficiency and maintain low fares. In both cases, the Delegation Contract becomes a new kind of digital-social contract, shaping brand identity while also managing liability and trust. This will inevitably give rise to new standards in digital contracting and new categories of insurance designed to cover “agentic risk.”

By combining clear rules with transparent, user-centric design, organizations can turn initial skepticism into lasting confidence, making trust the defining foundation of agentic adoption.



Section 5:

Quantifying the Agentic Advantage

For any strategic initiative to gain traction, it must be supported by a robust business case. This is especially true for AI. While the technology's potential is extraordinary, execution has often fallen short.

According to S&P Global Market Intelligence's 2025 survey, around:

42%

of companies had **abandoned** most of their **AI initiatives**.

One of the most frequently cited reasons:

AI efforts lacked clear performance criteria that linked directly to business value — whether ROI, cost savings, or measurable outcomes. Without tangible metrics, projects fail to inspire confidence, lose executive sponsorship, and ultimately stall.

The **Agentic Tourism model** addresses this gap head-on. It is not only an investment in seamless experiences, operational resilience, and sustainability, but also in **measurable performance**. To prove the ROI of agentic adoption, traditional tourism metrics like Revenue Per Available Room (RevPAR) or passenger yield are no longer sufficient. They capture only fragments of the value created.

What is required is a **new, more holistic scorecard**: one that mirrors the five agent archetypes and captures value across efficiency, personalization, sustainability, wellbeing, and economic opportunity. With agents instrumenting every part of the journey, we now have the ability to connect system actions directly to business outcomes — showing, for example, how a drop in wait times was caused by a redeployment decision made by the Operations Optimizer, or how NPS rose when the Experience Maximizer empowered staff to deliver a proactive “Amplify” moment.

This reframing moves us beyond lagging indicators into a **live dashboard of value creation**, one that makes the business case for Agentic Tourism not theoretical, but undeniable.

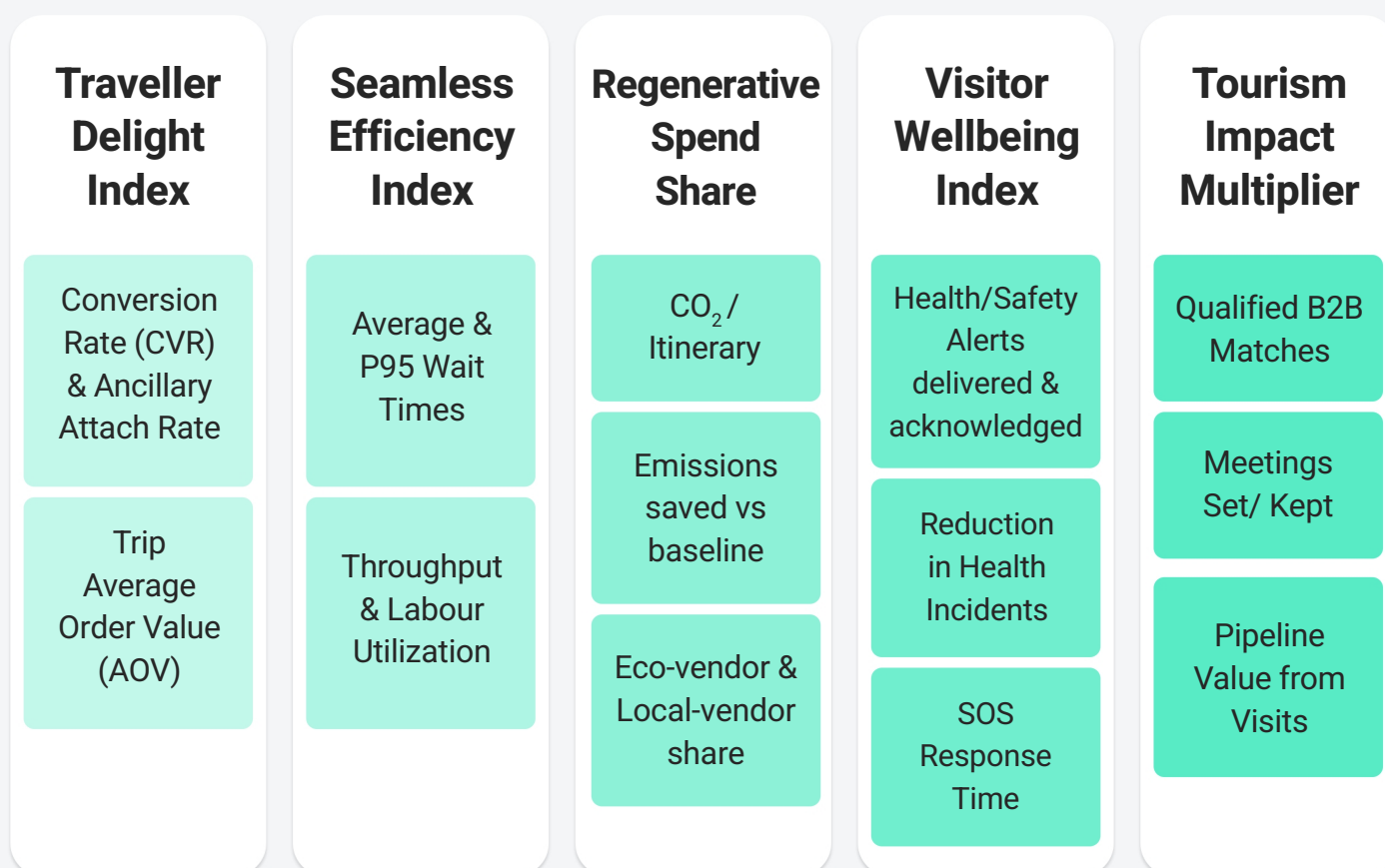
5.1 KPIs across five domains

The high abandonment rate of AI projects underscores the need for a more rigorous approach to measurement. If nearly half of companies give up on their AI efforts because outcomes are unclear, then defining **the right KPIs from the start becomes mission-critical**.

The Agentic Tourism scorecard is structured around the five key areas where agentic systems create value, directly mirroring the five agent archetypes and capturing performance across the entire framework.

Infographic #3

Measuring What Matters



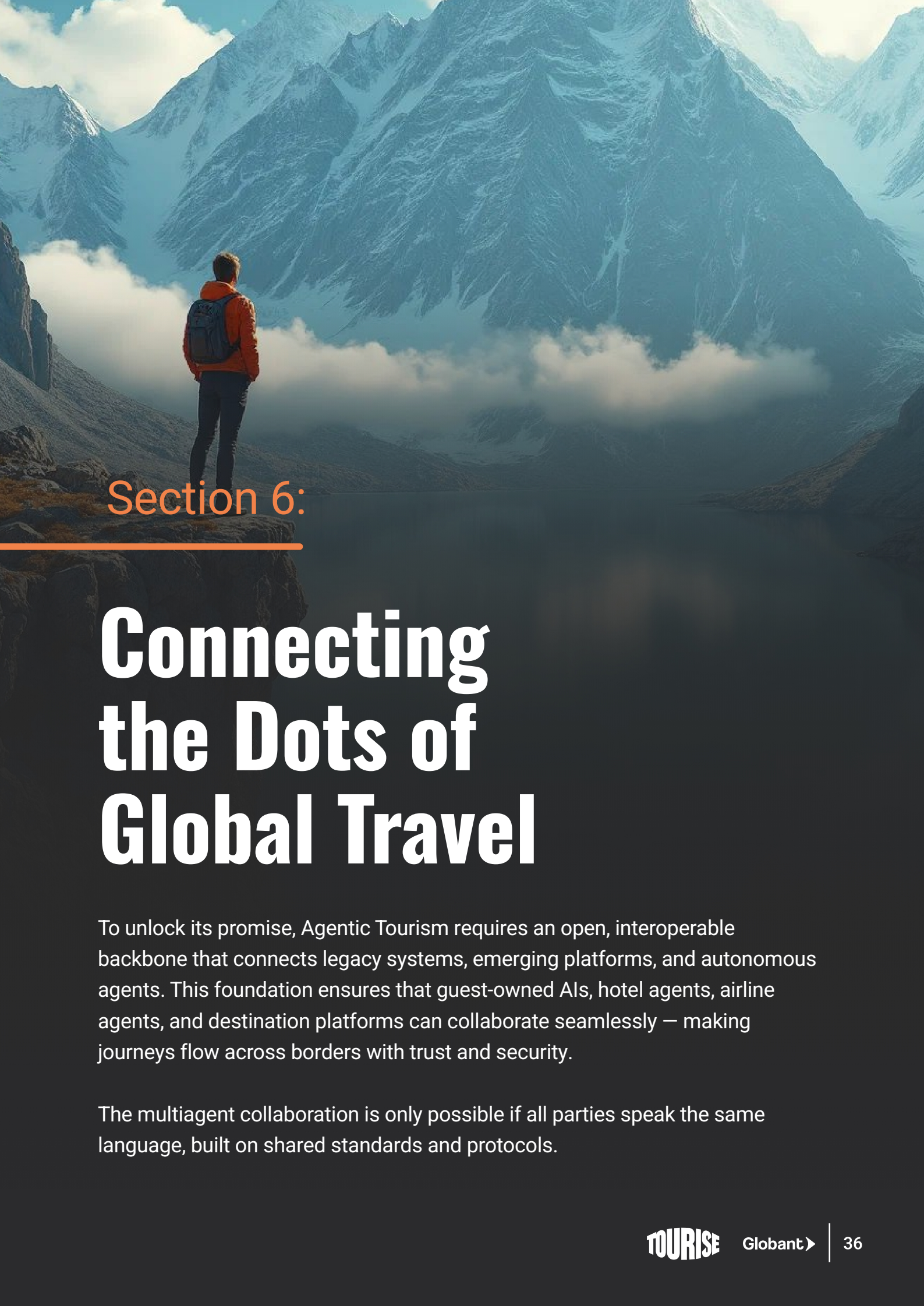
5.2 Instrumentation and Attribution

For this scorecard to be a strategic tool, results must be directly attributable to the agentic system's actions across the different domains. This requires a closed-loop attribution system that can demonstrate, for example, that a drop in P95 queue times was driven by a specific staff redeployment suggested by the Operations Optimizer (**Automate**). Or, more powerfully, it could show that guests who received a proactive “Amplify” moment from a staff member (prompted by the Experience Maximizer) had a 15-point higher NPS than those who did not.

Success depends on the careful orchestration of these KPIs across domains. Naturally, there will be tension between agents - for example, the Experience Maximizer may demand compromises from the Operations Optimizer. The critical capability lies in managing this negotiation: setting clear parameters, balancing priorities, and ensuring alignment across the system.

Ultimately, this elevates the scorecard from a static reporting tool into a dynamic engine for continuous learning—demonstrating, without question, the ROI of investing in both technology and human talent, while relentlessly optimizing performance across the system.





Section 6:

Connecting the Dots of Global Travel

To unlock its promise, Agentic Tourism requires an open, interoperable backbone that connects legacy systems, emerging platforms, and autonomous agents. This foundation ensures that guest-owned AIs, hotel agents, airline agents, and destination platforms can collaborate seamlessly — making journeys flow across borders with trust and security.

The multiagent collaboration is only possible if all parties speak the same language, built on shared standards and protocols.

6.1 The Call for an Agentic Tourism Protocol

The technical architecture on its own isn't enough. Unless there's industry-wide agreement on standards, the ecosystem will inevitably fragment into proprietary, competing walled gardens, defeating the vision of a seamless, "no-stop shop" experience.

This calls for the formation of an **Agentic Tourism Coalition**, a non-profit governing body composed of key industry stakeholders—airlines,

hotel groups, DMOs, OTA's, GDSs, regulators, and technology companies. The primary mandate of the Coalition would be to develop, maintain, and adopt an Agent Travel Protocol (ATP), so agents can communicate with each other as well as codify Delegation Contracts to balance automation with human oversight, and ensure open standards and interoperability across borders.



6.2 The Case for an Open Protocol

The creation of an open protocol is the most effective defense against the rise of a new, dominant intermediary that could consolidate power, and tax the entire ecosystem. An open protocol levels the playing field, ensuring that operators compete on the strength of their experiences and their capacity to deliver value in the moments that matter most to travelers.

The industry now faces a choice: closed 'Walled Agents' controlled by a few, or an open protocol that empowers all to innovate and deliver seamless, human-centered journeys. The path forward is clear — we must build the Coalition now.



Section 7:

Reshaping the Industry in the Agentic Era

Agentic Tourism is set to redraw the industry gameboard. By inserting autonomous agents as active players in the visitor economy, it doesn't just enhance experiences or operations—it rewires how power, profit, and relationships flow across the value chain. Where today's landscape is shaped by aggregators and intermediaries, tomorrow's will be shaped by whoever builds the most trusted and capable agents. For operators, distributors, and policymakers, this marks a pivotal juncture: a moment of disruption that carries as much risk as it does opportunity.

7.1 Three Competitive Plays in an Open Ecosystem

In this new landscape, three primary strategic postures are likely to emerge, re-contextualized by the existence of an open protocol:

1. Walled Agents (The Anti-Protocol Play):

Large incumbents may still attempt to build closed ecosystems, betting that their brand and existing user base are strong enough to resist the pull of an open standard. This becomes a high-risk, high-reward strategy. If successful, they achieve platform dominance. If the open protocol gains traction, they risk becoming isolated and irrelevant.

2. Open Rails (The Infrastructure Play):

This strategy involves becoming the essential infrastructure that powers the ATP ecosystem. Instead of aggregating demand, these players provide pay-per-use APIs for critical services like secure identity verification, cross-border payment settlement, verified sustainability data, or agent certification. They become the trusted “highway” of the new economy.

3. Meta-Agents (The Intelligence Play):

These players thrive on an open protocol. They build no inventory and own no infrastructure. Their entire value proposition lies in building the most capable and trusted agent—a true digital fiduciary for the traveler. Their competitive edge is superior reasoning, planning, and problem-solving, allowing them to orchestrate services from across the Open Rails ecosystem to deliver the best possible journey.

Even though some incumbents might still try the Walled Agent route, we think it's fragile and ultimately unsustainable. There's no denying the gravitational pull of an open standard - travelers and operators alike will demand interoperability, transparency, and trust.

In contrast, both Open Rails and Meta-Agents can thrive on an open protocol. Infrastructure players can anchor the ecosystem by providing the secure, reliable services that every agent depends on. Meta-Agents, meanwhile, can compete on intelligence, trust, and experience - delivering differentiated value to travelers without needing to own supply or infrastructure. Each posture can succeed in isolation depending on the player's starting point and capabilities.

But the real long-term winners will be those who combine the two: building trusted rails while also fielding powerful agents to capture traveler trust directly. This hybrid play creates resilience, defensibility, and outsized influence across the ecosystem.

Our recommendation is therefore clear: stakeholders should embrace the open protocol as the foundation, and orient their strategies toward a hybrid of Open Rails and Meta-Agents. Those who do so will shape - not just survive - the agentic future of tourism.



Section 8:

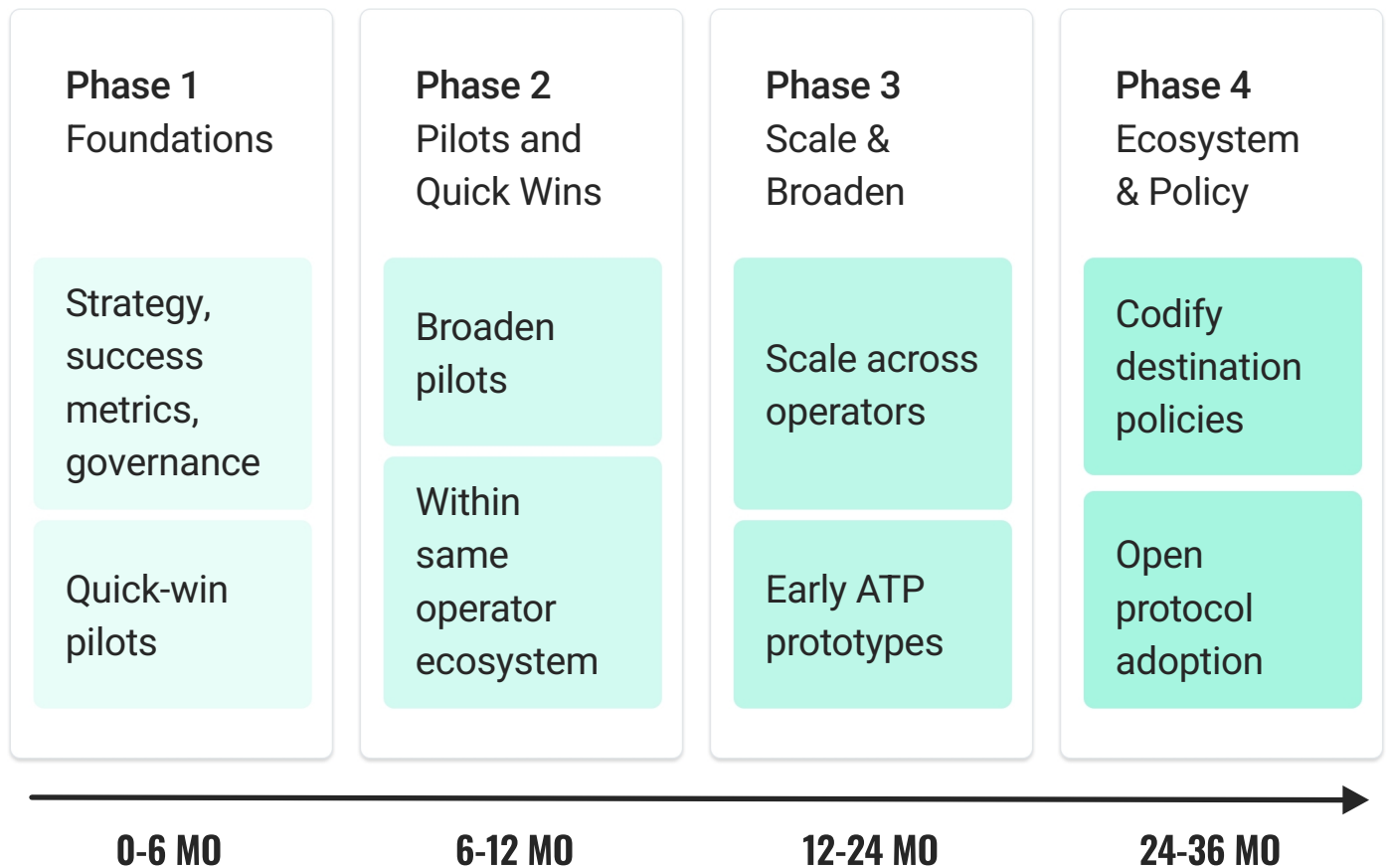
A Pragmatic Roadmap for Transformation

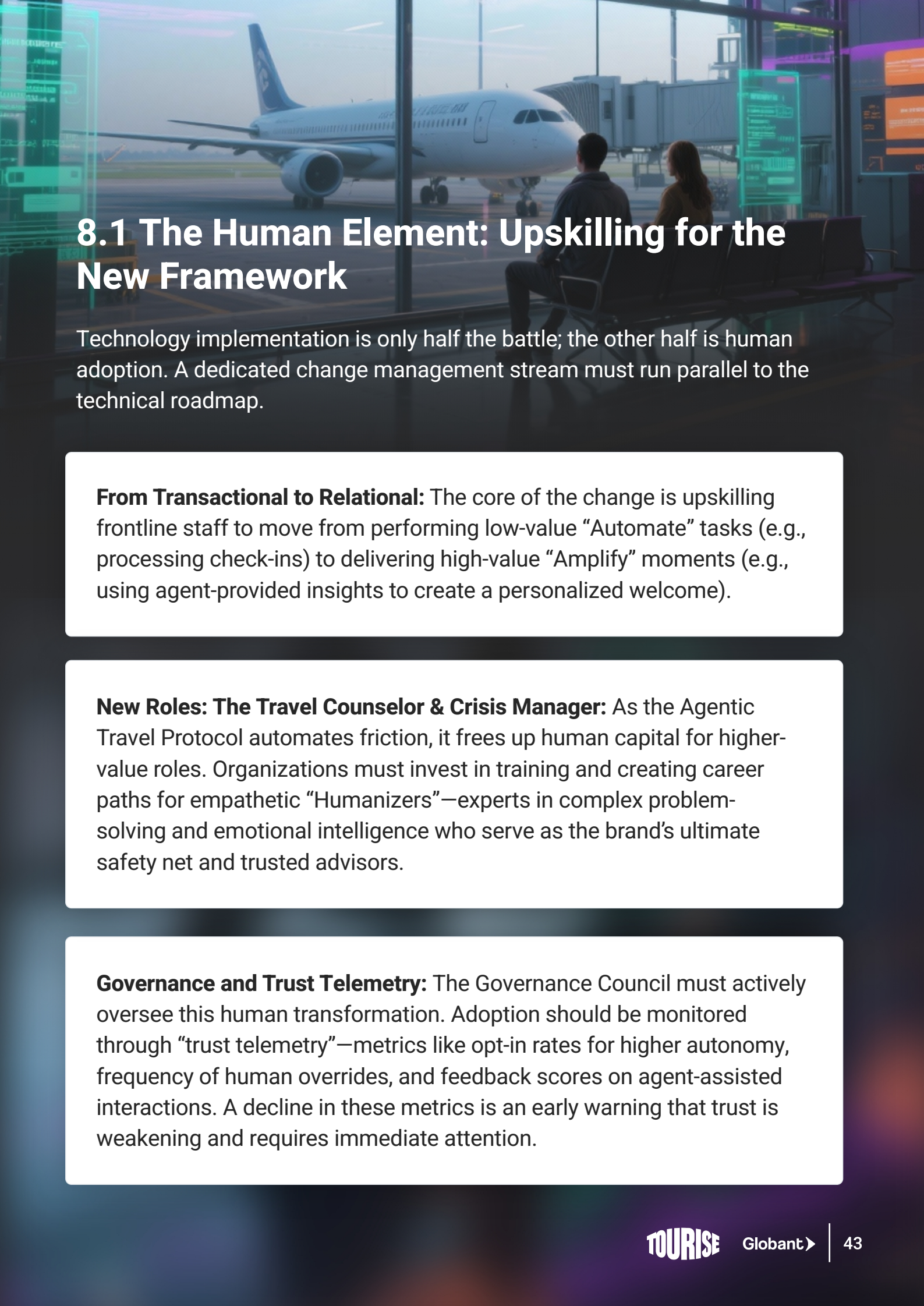
Adoption of Agentic Tourism is a journey, not a destination. It calls for a pragmatic approach that balances ambition with discipline. A structured 24–36 month roadmap helps de-risk investment, deliver early wins, and build the trust, scale, and policy alignment needed to turn vision into measurable outcomes.



Infographic #4

A Pragmatic Roadmap for Transformation





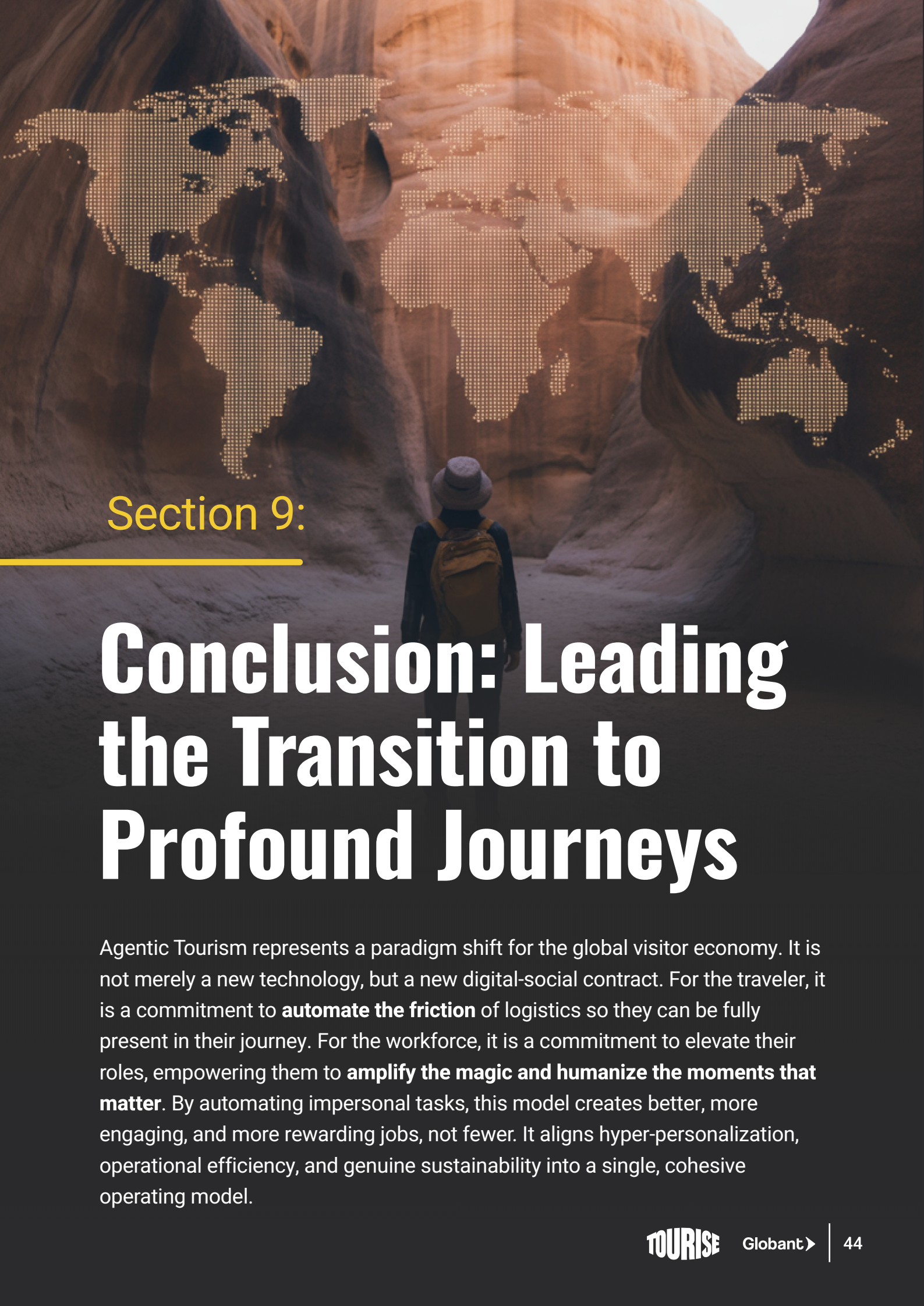
8.1 The Human Element: Upskilling for the New Framework

Technology implementation is only half the battle; the other half is human adoption. A dedicated change management stream must run parallel to the technical roadmap.

From Transactional to Relational: The core of the change is upskilling frontline staff to move from performing low-value “Automate” tasks (e.g., processing check-ins) to delivering high-value “Amplify” moments (e.g., using agent-provided insights to create a personalized welcome).

New Roles: The Travel Counselor & Crisis Manager: As the Agentic Travel Protocol automates friction, it frees up human capital for higher-value roles. Organizations must invest in training and creating career paths for empathetic “Humanizers”—experts in complex problem-solving and emotional intelligence who serve as the brand’s ultimate safety net and trusted advisors.

Governance and Trust Telemetry: The Governance Council must actively oversee this human transformation. Adoption should be monitored through “trust telemetry”—metrics like opt-in rates for higher autonomy, frequency of human overrides, and feedback scores on agent-assisted interactions. A decline in these metrics is an early warning that trust is weakening and requires immediate attention.



Section 9:

Conclusion: Leading the Transition to Profound Journeys

Agentic Tourism represents a paradigm shift for the global visitor economy. It is not merely a new technology, but a new digital-social contract. For the traveler, it is a commitment to **automate the friction** of logistics so they can be fully present in their journey. For the workforce, it is a commitment to elevate their roles, empowering them to **amplify the magic and humanize the moments that matter**. By automating impersonal tasks, this model creates better, more engaging, and more rewarding jobs, not fewer. It aligns hyper-personalization, operational efficiency, and genuine sustainability into a single, cohesive operating model.

The path forward, as outlined in this report, is a pragmatic and phased one. **It begins with building solid foundations in strategy, data, and governance, guided by our Intelligent Experience Framework.** It gains momentum through carefully scoped pilots that prove value and build trust. It scales by methodically expanding capabilities, and it matures by fostering an open, interoperable ecosystem. The five-agent framework—Experience, Operations, Regeneration, Wellness, and Opportunity—provides a clear blueprint for this journey.

The transition to an agentic operating model is no longer a question of “if,” but “when” and “how.” The technological enablers are in place, the consumer demand for seamlessness is clear, and the economic and social imperatives are undeniable.

Industry leaders now face a choice: to wait and be disrupted by new intermediaries and more agile competitors, or to proactively lead the transition.



AI in tourism is projected to reach: **USD 13.86 billion** by 2030, growing at **26.7% CAGR**.

Compared to other industries, tourism is still far behind:



AI in manufacturing is expected to reach **USD 47.9 billion**.



AI in food & beverage **USD 84.8 billion**.

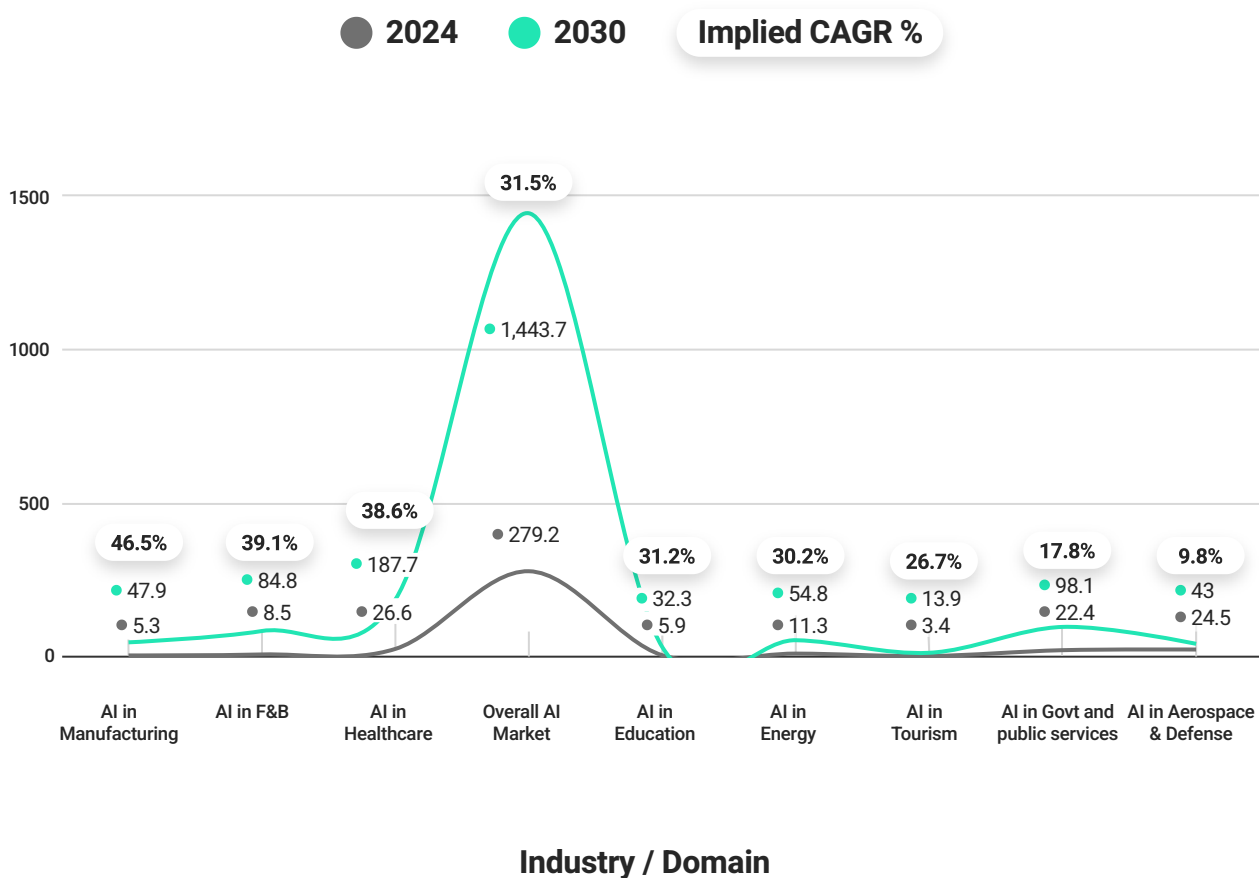


AI in healthcare an extraordinary **USD 187.7 billion** by 2030.

This gap highlights both the risk and the opportunity – tourism has not yet captured its full potential, and those who wait risk being overtaken by more agile competitors.

Graphic #3

The AI Opportunity in USD Bn



The most urgent strategic imperative is to engage now in the formation of the **Agentic Tourism Coalition**. This collective action is essential to ensure the future of travel is built on open, competitive, and innovative principles rather than closed, monopolistic ones.

The ultimate goal is to create a visitor economy that is not just more efficient, but more meaningful. By mastering the Intelligent Experiences Framework, the industry can finally deliver on the profound promise of travel: to create journeys that foster learning, evoke emotion, and build the lasting human connections that are the very reason we explore the world. Those who act with vision and consistency will not only secure their competitive advantage but will also help shape a visitor economy that is more rewarding for guests, more resilient for operators, and more regenerative for the planet.



ANNEX: Enabling the Vision: The Role of Enterprise AI Platforms



The theoretical architecture of Agentic Tourism requires a practical foundation to build upon. The immense complexity of integrating disparate AI models, legacy data systems, and real-time APIs is a significant barrier to entry. This is where enterprise-grade AI platforms become critical enablers, providing the foundational “picks and shovels” needed to construct sophisticated agentic systems. These platforms are designed to solve the core technical challenges of interoperability, scalability, and security, thereby accelerating the development and deployment of agentic solutions.

A primary function of an enterprise AI platform is to act as a universal translator or a “connective tissue” for a fragmented technological landscape. Today’s enterprises often have investments across multiple cloud providers and AI frameworks. This transforms the platform from a standalone tool into a comprehensive integration hub, enabling a travel company to build a cohesive agentic strategy without being locked into a single vendor. This interoperability is crucial for

Agentic Tourism, as it allows a single travel agent to leverage the best available tools from across the entire market to fulfill a user’s request.

As previously noted, security is a paramount concern for any agentic system handling sensitive traveler data. Enterprise AI platforms are built with security as a core principle, providing robust authentication, authorization, and data governance modules to ensure that data is handled securely and in compliance with business rules. They provide a “golden path” for scaling AI responsibly, giving CIOs control and visibility over AI usage within the organization. Furthermore, these platforms are designed for scalability, ensuring that as an agentic service grows from a pilot project to a core business function, the underlying infrastructure can handle the load without compromising performance. This combination of a secure, scalable, and interoperable foundation is what makes enterprise AI platforms a key enabler for turning the ambitious vision of Agentic Tourism into a commercial reality.



About TOURISE

TOURISE is the world's premier platform for shaping the future of global tourism. Powered by the Saudi Ministry of Tourism, its inaugural Summit will be held November 11–13, 2025, in Riyadh. Bringing together global leaders across government, business, investment, and technology, TOURISE drives transformative initiatives and year-round collaboration to build a tourism sector that is sustainable, equitable, and future-focused.



About Globant

At Globant, we help organizations thrive in a digital and AI-powered future. Our industry-focused solutions combine technology and creativity to accelerate enterprise transformation and design experiences customers love. Through digital reinvention, our subscription-based AI Pods, and Globant Enterprise AI platform, we turn challenges into measurable business results and promised savings into real impact.

- We have more than 30,000 employees and are present in over 35 countries across 5 continents, working for companies like Google, Electronic Arts, and Santander, among others.
- We were named a Worldwide Leader in AI Services (2023) and a Worldwide Leader in Media Consultation, Integration, and Business Operations Cloud Service Providers (2024) by IDC MarketScape report.
- We are the fastest-growing IT brand and the 5th strongest IT brand globally (2024), according to Brand Finance.
- We were featured as a business case study at Harvard, MIT, and Stanford.
- We are active members of The Green Software Foundation (GSF) and the Cybersecurity Tech Accord.
- We are global partners of Open AI, NVIDIA, AWS and Unity bringing world-class technology together to accelerate innovation across industries.



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A night street scene with a dense canopy of green lights hanging over a sidewalk. Silhouettes of a crowd of people are walking away from the camera. The scene is dimly lit, with the primary light source being the green lights and some distant streetlights. Signs for 'ANDRE SNOVS' and 'HOTME' are visible on the buildings.

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