



The Agentic Commerce Shift: How Travel & Hospitality Will Win the AI Era

A guide for Travel & Hospitality CEOs



Travel is becoming a machine-to-machine market wrapped around human moments. The winners will be the companies that make their inventory, policies, service quality, and brand trust readable and executable by agents.

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PART I. WHY THIS SHIFT MATTERS NOW

Change isn't chaos. It's a new shape waiting to be named.

1.0 The cost of Intelligence Just Collapsed

The Pattern

Every decade, a technology wave collapses the marginal cost of something fundamental: Computing made calculation free, the internet made distribution free, mobile and cloud made access free. Each time, the incumbents who had the most to gain were the slowest to move. Each time, the shift looked smaller than it was at the start.

We are now inside the next collapse. AI is making intelligence and creativity free. Free in the sense that the marginal cost of one more recommendation, one more comparison, one more personalized itinerary is approaching zero. A decade ago, producing a single customized travel proposal required a human agent spending thirty minutes pulling data from multiple systems, cross-referencing availability, and formatting a response. Today, a foundation model running on Amazon Bedrock can do the same work in seconds, at a cost measured in fractions of a cent.

This is a structural change in the economics of every customer interaction. Each wave was dismissed by incumbents. "Who would book a hotel on a phone?" was a real question asked in boardrooms less than fifteen years ago. "Who would let an AI agent book their flight?" is the equivalent question being asked today. History suggests the answer is: almost everyone, faster than you expect.

The Arrival of True Agentic Commerce

Generative AI was about creating content; Agentic AI is about acting. We are moving away from an era where humans navigate websites, and into the era of *Agent-to-Agent* (A2A) interactions. This means a consumer's personal AI assistant will negotiate directly with a hotel or airline's AI agent. Through emerging industry standards like the Model Context Protocol (MCP), these intelligent systems can securely share context, retrieve live database information, and execute complex workflows across interconnected APIs without human intervention.

The New Premium: Verified Truth

When intelligence is cheap, truth becomes expensive. In a world where any AI can generate a compelling hotel description, the premium shifts to verified, real-time, machine-consumable truth. Can the agent confirm, with certainty, that this room is actually quiet? That this flight has lie-flat seats in business class? That this restaurant accommodates severe nut allergies?

The brands that own physical assets have a structural advantage. They are the source of truth. But only if they make that truth accessible. A hotel that knows its rooms are quiet but buries that information in an unstructured PDF brochure has no advantage over a competitor that exposes the same data through a clean, machine-readable API.

2.0 Why Travel Is More Defensible Than It Looks; and More Exposed Than It Feels

The Structural Advantage

Travel and hospitality own something most digital industries do not: scarce physical moments. A hotel room on a cliff in Amalfi, a first-class seat on a transatlantic red-eye, a sunset dinner on a rooftop in Santorini, or a perfectly timed connection through Singapore that turns a fourteen-hour layover into a hawker center crawl cannot be digitized away and are real, physical, and finite experiences. Unlike commodity retail where an AI agent can substitute one white t-shirt for another with near-zero switching cost, travel experiences are differentiated by nature and are the industry's structural advantage.

The Conditional Advantage

The fear of Digital Gatekeepers disintermediating travel ten years ago has a direct parallel today. Airlines spent a decade fighting to control their own distribution: They wrested power from Global Distribution Systems (GDSes), invested billions in direct channels (e.g. website, mobile app), and built loyalty programs designed to keep customers inside their ecosystem. That hard-won position is now at risk again; this time from AI agents that ignore a brand's homepage, app, or loyalty program's emotional branding. Instead, an AI agent cares about three things: Is the data accurate? Is the API reliable? Does the offering match the user's intent?

The Middlemen Are Not Dead. They Are Evolving

It would be a mistake to dismiss travel intermediaries. Online Travel Agents (OTAs), Meta Search Engines (METAs), and their technical peers are not simply vulnerable middlemen waiting to be disrupted. They possess the most comprehensive, standardized, agent-ready data in the industry. They have spent decades normalizing hotel descriptions, standardizing room types, aggregating reviews, and building APIs that third parties can consume reliably.

The true battleground is not eliminating intermediaries but winning the arms race for trust. And specifically, who will own the consumer's permission to act?

The Personalization Paradox: When Everyone Can Personalize, Context Becomes the Moat

When intelligence costs nearly nothing, personalization stops being a luxury reserved for elite-tier customers and becomes a baseline expectation for every traveler. A decade ago, delivering truly personalized service required expensive human labour accessible only to high-value segments. Today, that constraint has collapsed: Foundation models can process a traveler's complete history, preferences across three airline programs and four hotel chains, credit card rewards points, and real-time context in seconds and at marginal cost measured in fractions of a cent.

If every brand can generate a "personalized" recommendation using the same foundation models and the same shallow data, then personalization itself provides no competitive advantage. The new competitive divide is how deeply a brand understands individual context. Brands that earn permission to access rich, persistent context (the noise complaint from the last hotel stay, the pattern of always skipping breakfast, the implicit preference for window seats on short hops but aisle seats on red eyes) build a moat that generic AI cannot replicate. This context accumulates across every interaction (booking, disruption recovery, loyalty redemption, post-trip feedback) and is proprietary, earned through trust, and the foundation for anticipatory service that feels genuinely helpful rather than algorithmically intrusive.

The brands that win won't be those with the best AI models. In fact, foundation models are increasingly commoditized. The winners will be those that earn, protect, and leverage the deepest contextual understanding of each traveler.

3.0 Discovery Has Changed, and Agents Are the New Distribution Layer

For two decades, the golden rule of travel distribution was brutally simple: Own the traffic, own the customer. Whether for a global hotel chain, a regional airline, or an OTA, billions of dollars were poured into Search Engine Optimization (SEO), paid search, metasearch, social media, and brand marketing with a single, unyielding objective: Get the traveler to click the link. Once on the website, the winner controlled the environment, the brand experience, and of course the conversion.

This premise is breaking: In the agentic era, a brand's most profitable customer may never visit the homepage and therefore never see the carefully chosen brand and marketing investments. Instead, customers increasingly open a conversational interface or speak to their primary life agent - whether it runs on a consumer platform, a first party provider, a corporate travel tool, or an enterprise assistant - and simply declare their intent: "Plan a three-night beach break next month, under two thousand dollars, with a quiet room and good food nearby. Use my loyalty points if it makes sense." Behind the scenes, all happens without any web browser. Instead, agents rely on indexed crawled data, or increasingly on content retrieved from providers through APIs. This shift has led to the emergence of Generative Engine Optimization (GEO), which is rapidly replacing traditional SEO as customers move to agentic channels and SEO becomes less and less effective.

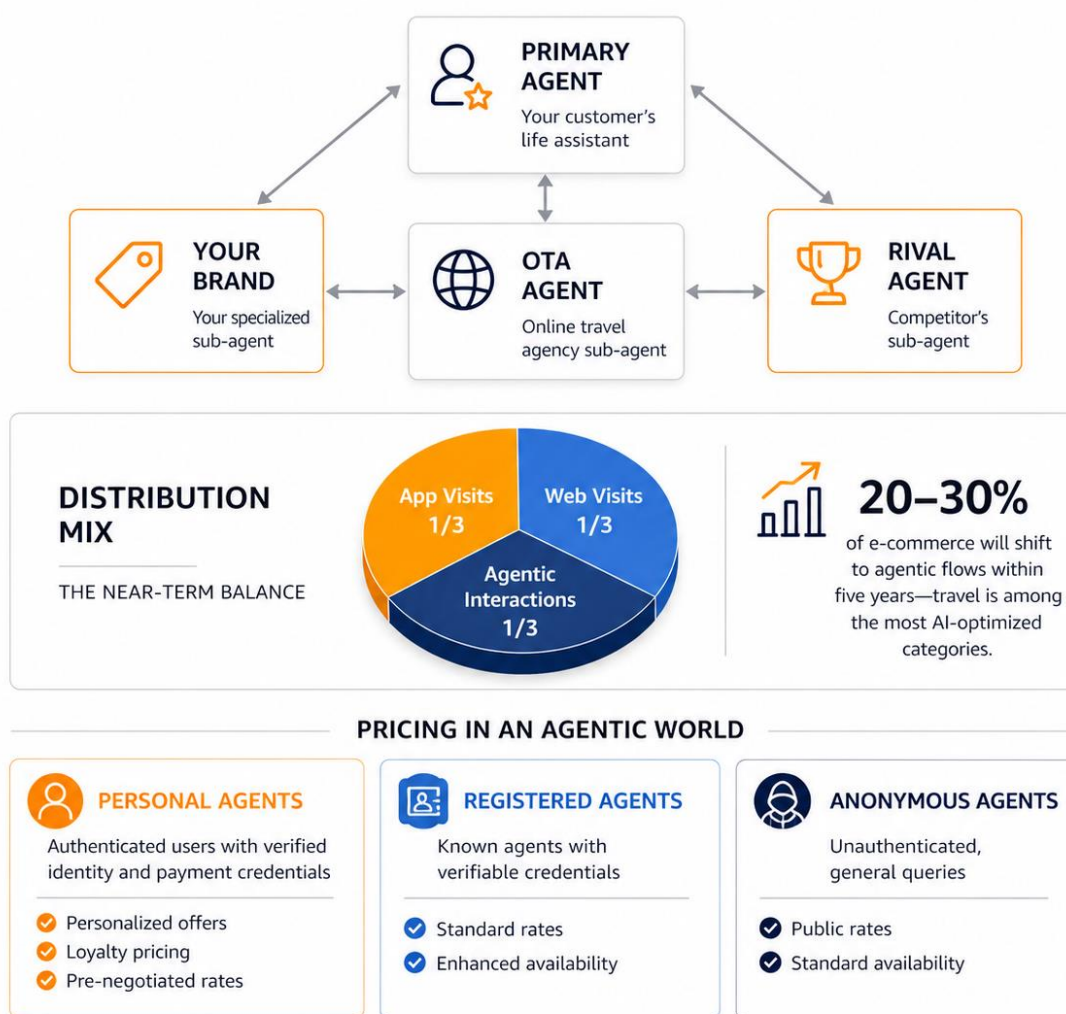
The Primary Agent and the Specialized Sub-Agent

The emerging architecture of travel distribution is fundamentally a two-tier, machine-to-machine ecosystem, driving what industry analysts call Agent-to-Agent (A2A) commerce. At the top sits a customer's Primary Agent. This is the overarching orchestration engine. It possesses deep context on the user, which can include their calendar, their budget, their dietary restrictions, and their historical preferences.

However, outside of select simple first party transactions, the Primary Agent doesn't inherently know the real-time availability of a corner suite in Manhattan or the exact luggage policies of a transatlantic flight. To acquire that, it negotiates directly with Specialized Sub-Agents, uses

emerging interoperability standards like the Model Context Protocol (MCP), and exchanges intent, verifies data, and retrieves terms in milliseconds. The new "book direct" is no longer about driving human eyeballs to a URL, but about becoming the preferred, most frictionless endpoint that Primary Agents route to understand, trust, and transact.

The New Distribution Layer



The One-Third Model

Predicting the immediate and overnight death of the website would be premature. Instead, for the next several years, the distribution mix will converge toward a transitional framework: the

"One-Third Model". Roughly one-third of bookings will come through direct channels, like mobile apps, website, and call center representing the most loyal, direct-relationship customers. One-third will continue to come through traditional OTAs, Travel Management Companies (TMCs), and other indirect channels. But the final third is migrating rapidly toward agentic interactions and in-chat automated flows. By 2030, McKinsey estimates that agentic commerce could drive up to \$5 trillion in global B2C value (1), while Gartner forecasts that AI agents will intermediate a staggering \$15 trillion in B2B purchases by 2028 (2).

Treating this final, agent-driven third as merely an extension of existing digital marketing functions is a strategic error. Companies that view agentic distribution as a fundamentally new channel - giving it the same strategic weight, dedicated teams, and capital investment that mobile received in 2012 - will define the market.

Amazon Rufus: Scaling conversational shopping experiences to millions of customers with Amazon Bedrock.

Amazon's AI shopping assistant Rufus uses Amazon Bedrock to deliver conversational, agentic experiences from product research to price tracking. By combining multiple foundation models with agentic tool use, Rufus queries live inventory, accesses order history, remembers customer preferences across sessions, and can auto-buy products when they hit a target price. Over 300 million customers used Rufus in 2025, with users 60% more likely to complete a purchase.

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PART II: WHAT WINNERS NEED TO BUILD

It is not the strongest of the species that survives, nor the most intelligent, but the one most adaptable to change.

4.0 The Machine-Readable Brand

The shift from traditional search engines to AI-powered travel discovery is clear and data-driven. In 2025, 40% of customers used AI to search for travel, and 50% of customers said they were likely to book options recommended by AI (3). Brands must meet customers where they shop or risk being left behind. In the agentic era, brands are not what humans see but what machines can reliably consume. Travel brands spent decades perfecting visual identity and emotional storytelling. These elements are now invisible to AI agents. What matters now is how well the data reflects those differentiators, and how unstructured data can be structured for agents, so machines can find them, understand them, and recommend them.

Generative Engine Optimization and Answer Engine Optimization

"Share of Model" - how often AI mentions your brand - is replacing traditional organic traffic metrics. Brands win by becoming the trusted example AI pulls into responses, earning a place inside the answer itself rather than fighting for search rankings.

Two new emerging disciplines are replacing SEO:

- Generative Engine Optimization (GEO) makes brands findable by AI. GEO structures the online presence so AI systems can find, understand, and recommend a brand.
- Answer Engine Optimization (AEO) makes brands the answer AI gives. AEO ensures content directly answers natural language questions travelers ask AI assistants.

Together, they shift the focus from page rankings to inclusion in AI-synthesized answers, whether the source is indexed content or real-time retrieval from sub-agents.

Measuring visibility is the first step

Amazon Bedrock helps brands measure and track their visibility across AI-powered search channels. AWS published an open-source Citation Analysis tool that queries multiple models with live web search functionality and configurable search keywords, captures responses and the sources they cite, and crawls cited pages to build a picture of which brands are being mentioned, how often, and in what context. It tracks first-party and competitor brand mentions with sentiment analysis, identifies citation gaps where competitors are being referenced, and

calculates a "share of model" visibility score over time.
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Agent Experience as a New Discipline

Much like SEO was a dynamic and iterative data-driven discipline, a core GEO technique consists in refining data presentation to create structures understandable by agents. Just as user experience (UX) design emerged to serve human users, Agent Experience (AX) is emerging to serve AI agents. A human provided with cluttered interfaces leaves, and a model provided with cluttered data loses focus, hallucinates, or ignores it entirely. AX sits at the intersection of data engineering, API design, usability, and brand strategy to ensure data is legible to foundation models.

AX looks different at each stage of the journey. Early in the funnel, where brand and context are mostly static, AX means structured data, schema markup, and clean APIs designed for foundation model consumption. AX means thinking about a brand from a machine's perspective: one with no eyes, no emotions, no patience for ambiguity, and a need for clean inputs and clear outputs.

In contrast, later-stage funnel activities require clear real-time pricing and inventory visibility. Agents need to know, with certainty and in real time, what a brand offers, what it costs, and what the rules are. Experience shows that agents also need data to be guided when it comes to product comparison, selection, and co-purchasing. AX is responsible for delivering carefully curated data that matches user intents, even for broad and unique customer questions. The same principle applies for aggregator agents consolidating multiple providers or multi-modal options: AX must unify data before foundation model consumption.

Agent Experience in the Travel Technology Ecosystem

Intermediaries like OTAs and travel technology providers like GDSs have a key advantage of decades of normalising data at scale, cleaning and displaying information in a standard format that allows users to search and filter with consistent results. For hospitality for example, OTAs

perform the legwork of normalising data from global luxury chains and family-run B&Bs into a single, searchable, format.

Agent Experience can bring up uncomfortable truths: Many brands' public data about their own properties is less detailed and structured than what OTAs have cleaned up for their own uses. Inconsistent descriptions, stale amenity and service lists and pricing that varies across channels can cause brands to further lose ground to third parties. Brands with thousands of properties worldwide that aren't having their content actively maintained can quickly fall behind. However, if a brand does try to get its own data right, an agent can go directly to the source. If the data is already reliable, regularly updated and correctly structured, the agent can verify that information and complete the booking directly. This emphasises the need to treat data quality as a key distribution strategy rather than an IT task.

TUI Group: Scaling Hotel Content Creation with Generative AI

TUI Group, serving 21 million customers across 180 regions with over 400 hotels, needed to produce brand-consistent hotel descriptions at scale. Manual content creation took months and could not keep pace with portfolio growth. Using Amazon SageMaker and Amazon Bedrock, TUI built a two-model pipeline to generate descriptions matching brand voice and applying formatting and style refinements. AWS Step Functions orchestrate the workflow with automated SEO scoring and quality gating before human review.

In blind testing, AI-generated descriptions were rated higher than human-written content 75% of the time. SEO scores improved up to 4%, and content generation became five times faster; producing thousands of descriptions in hours rather than months.

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5.0 The New Middleman Fight Is About Identity, Intent, and Permission

Many factors affect the decision to book direct versus through an OTA today: Prices, loyalty, promotional codes, itinerary continuity and customer support could swing customers one way or another, as do their trust thresholds for a third party to book the room or seat that they paid for.

The shift to Agentic Commerce affects those trust instincts. An agent that presents verifiable data confirming an airline booking – with the airline subsequently confirming such booking by email – builds perhaps more trust than some OTAs do today, even if some of those actions are taken autonomously.

Agent identity and the trust gap

Trust in commerce has always pointed back to people and the organizations behind them: A customer trusted a brand, a supplier trusted a buyer, and a payment provider trusted a merchant. Even in fully digital transactions, the trust model still assumed a human was on the other end.

Agentic systems break that assumption. An agent is not a tool that helps a user complete a task, but a new kind of actor that searches, decides, and transacts on someone's behalf. The receiving system, whether that is an airline's booking engine or a hotel's payment gateway, needs to know who this agent is, who authorised it, what it is allowed to do, and whether that authority is still valid.

This is where the concept of a mandate becomes important. A mandate defines the boundaries of what an agent can do on behalf of its user. Some mandates are open: find me a flight to Thailand for under \$1,500, with a checked bag, arriving before Friday. The agent has discretion within those limits. Other mandates are closed: buy this exact flight on this date at this price. The agent is executing a specific, pre-approved transaction.

In both cases, every action the agent takes should trace back to the original intent and the identity that approved it. More than authentication, this requires delegated authorisation

where the agent carries its own verifiable credential proving who it is, who authorised it, what it is permitted to do, for how long, and under what conditions.

The building blocks for this are emerging. National Institute of Standards and Technology (NIST) is framing agent identity as a first-class authorisation problem. The OpenID Foundation is working on how to verify who authorised an agent and on whose behalf it acts. Payment networks are moving too, with Visa, Mastercard and Stripe all launching separate agentic commerce initiatives since mid-2025, though no single standard has emerged yet.

The shift is from treating agents as suspicious automation to recognising them as verified actors with bounded permissions and a full audit trail back to the human who delegated authority.

Permission as the new moat

A key battle for agents is also permission, specifically who the customer authorizes to act upon their behalf. In a traditional OTA booking flow, a customer searches for holiday options and the OTA returns options to them, which they choose and work through the payment flow until the booking is completed. When an agent is given permission to make a booking for a customer, however, it is given decision-making authority with their data. The agent selects options, pays, and manages the entire booking.

What makes this a "moat" is that once a customer has given permission to one entity, it's unlikely to be given to others. It is not in the customer's interest to hand out their personal information, payment details, and authorization to spend their money to various agents, so whichever entity earns that permission first has a huge advantage. Switching costs are high as users need to re-enter their details and preferences into multiple agents, and trust can be hard to build elsewhere once established. The entity that owns that permission owns the customer relationship, and everything else in the chain is merely a supplier.

The impact of permission grants extends throughout purchases and customer actions. Consider the following example: A family books a trip to Greece through an agent. A month later, the flight was cancelled. Rather than waiting to receive a refund or spend time on the phone at a contact center, the agent has permission to handle the disruption. It rebooks their flights, checks their hotel's cancellation window, contacts the hotel to change the dates, adjusts their

car hire dates, and sends the family a revised itinerary. All of this is enabled by that agent having permission to act across the entire trip, and an identity verified for providers to accept requests. The brand that holds that permission builds a depth of relationship in a way that SEO or paid search promotion never achieved. The brand that doesn't hold that permission must compete elsewhere, on price or data quality.

Alexa+: Turning Food Delivery into a Single Conversational Flow

With Alexa+, Amazon introduced an adaptive interaction model that lets customers browse restaurants, build and modify orders, ask questions, and complete checkout through one continuous natural-language conversation. Alexa+ dynamically matches menu items to spoken requests, updates the cart in real time, and adjusts its interaction style to the complexity of the task— a foundational step toward agentic commerce where the assistant reasons across context rather than executing isolated commands.

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6.0 From Inspiration to the Real Moment of Truth

Most agentic commerce stories fail here. Travel customers have little tolerance for friction and every gap in the chain (poor brand awareness, unclear pricing, slow responses, or lack of transparency) kills conversion. As shopping increasingly happens inside agents rather than on websites, those agents must support the full journey from discovery to completed transaction.

Working backwards from the transaction

In today's world, getting to a transaction takes a lot. Travelers spend more than five hours visiting 277 websites before booking a trip (4) largely because they must manually unify fragmented marketplace data, navigate options, and build trust before converting. Agentic commerce promises to compress this journey into a single conversation. But only if the data and transaction layer is reliable and trusted end to end.

The 277-website problem

To solve the "277 website problem," agents need comprehensive data access that consolidates travel information across suppliers, dates, and arrangements in a single pass, not through the narrow destination-and-date lookups that today's systems were built for. But a recommendation without a safe transaction is not strategic, so reliability is paramount.

The AX layer must do three things: give the agent precise and actionable data matched to what the traveler actually wants, give it clear tools to reason with, and provide a path to a decision rather than long lists of options. With the right AX layer, the agent can then replicate in seconds the five hours of shopping research a human currently does across 277 websites.

Payments, approvals, and delegation

The payments infrastructure for agentic commerce is evolving rapidly with autonomous checkout - where AI agents complete end-to-end purchases without human intervention at the payment step - now moving from concept to production. The challenge is dual: settlement infrastructure built for human-initiated transactions must adapt, and users must feel they remain in control even when they are not clicking "buy". Consumers are already granting spending limits and rules to their AI agents: "Book any flight under five hundred dollars on my preferred card." "Reserve a hotel room if the price drops below the rate I saw last week". Successfully earning this transaction and its subsequent steps (change, refund, and exception handling) is the moment of truth in agentic commerce.

Trust through User Experience

Customers will not let an agent spend their money unless three things are true.

First, brand trust: The agent must feel as safe and trustworthy as the booking channel it replaces. If a traveler trusts the airline's app today, the agent must meet that same bar.

Second, a clear functional contract: The agent must clearly articulate what it can do, what it cannot do, and how it makes decisions to deliver consistently across critical aspects like selection algorithms, transactional decision-making, and data sharing policies.

Third, control and reversibility: The customer must be able to see what the agent decided, understand why, and undo it. None of this works on models alone. It requires a software layer that orchestrates agents, data, and human judgment together.

Visa Intelligent Commerce on AWS: Research to Booking in One Flow

Visa Intelligent Commerce on AWS shows how agentic travel can move from research to booking in one secure flow, combining Amazon Bedrock AgentCore with Visa's payment capabilities. The solution uses a reusable multi agent architecture where a supervisor coordinates travel planning, cart management, and secure payment steps while keeping the user in control through confirmation at checkout. It gives developers a production-ready pattern for building trusted, scalable travel experiences with memory, identity, observability, and governed tool access built in.

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7.0 The Orchestration Layer Becomes the Product

Better models alone do not create enterprise value in agentic commerce. The bottleneck is not intelligence, but orchestration. Orchestration is the software layer that unifies data, delivers contextual knowledge, coordinates workflows, manages tools, enforces policies, and organizes customer data feedback loops. Without industry infrastructure that enables agents to reliably execute multi-step actions for complex tasks like travel shopping, agentic AI cannot deliver its full value.

Orchestration is where all needs converge: agentic applications need robust orchestration to deliver superior Agent Experiences (AX), end users need orchestration for frictionless and trustworthy user experiences, and the industry needs high-quality orchestration systems to provide the real-time, scalable, and governed context required for the transition to Agentic Commerce.

Why Travel Is Especially Hard

This orchestration challenge is particularly acute for the travel industry. Travel data is distributed, presented, and synchronized through many means. Most travel sales are intermediated, and data flows through multiple technical intermediaries. Commercial stacks are complex, designed to maximize conversion and performance that customers expect while enforcing the strategies of departments such as Revenue Management, Merchandizing, Inventory, Loyalty, and Distribution.

These systems were built for a different era: for rigid request-response formats organized by destination and dates, for human-facing interfaces, and for a world where deep customer knowledge resided with people, not agents. None were designed for an AI agent that needs to reason across all systems simultaneously, in real time, to answer a question like: "What is the best option for a Gold member flying from Madrid to Tokyo next month, considering price, schedule, upgrade availability, and lounge access?". This time, the winning stack will coordinate systems, humans, and agents together.

The Context Engineering Chasm

Anthropic released Model Context Protocol (MCP) to facilitate agentic data retrieval and execution in late 2024. MCP quickly became a de-facto standard for agentic applications. Yet agentic shopping production results remain scarce.

This happens because models are extremely sensitive to how data is provided – the AX, and in practice the performance of agentic applications quickly collapses when agent context is not optimized. The Context Engineering chasm is the difference between having a protocol for data access and providing agents with the deep contextual understanding required for production-grade agent behaviour. Context engineering is the new front-end development for agents. Just as front-end developers translate business requirements into user interfaces that humans can navigate, context engineers translate business knowledge into structured and precise data that maps to intents and expected outcomes for agents to reason over.

Unifying the industry data backbone

AI Agents cannot deliver on their promise without a unified, distributed data layer spanning the entire travel ecosystem purpose-built for free, efficient, and accurate querying at scale. The industry data backbone must undergo fundamental architectural transformation to get there.

This starts with unifying structured and unstructured knowledge by treating structured records like prices and product attributes as the authoritative spine, then layering unstructured data such as descriptions, reviews, and policies on top as on-demand contextual enrichment. This approach uses pre-computed entity resolution layers to deliver fresh knowledge graphs that enable agents to blend precise transactional answers with nuanced qualitative insights.

In addition, the industry must change its current architectural paradigms. A critical architectural change involves shifting from API-heavy or batch-centric systems historically serving destination-date requests to event-driven architectures. Industry-standard APIs (like PAOREQ and NDC Air Shopping) generate mounting cost and scalability pressures as look-to-book ratios surge. Event-driven architectures allow agent contexts to be proactively notified of offer-related changes as inventory and pricing rules change, enabling efficient re-computation

and reaggregation particularly well suited for the diverse open-ended queries and cross-provider requests required for agents to deliver Agentic Commerce.

Blending contexts

Agentic commerce unlocks new possibilities by compressing many diverse website visits into a single touchpoint. Behind the scenes, an agent must compile state, session, artifacts, and tool responses dynamically to reason in real time while maintaining high-quality AX. Complete agents will blend different context types:

- Short-term context: Current conversation, immediate requests, and session state.
- Long-term context: User's history, preferences, loyalty status, past interactions.
- Business context: Policies, rules, booking constraints, service standards.
- Environmental context: Real-time availability, weather, disruptions, events, competitor pricing.

The orchestration layer will assemble the relevant context and present it to the foundation model in a format that enables accurate reasoning, all within the latency budget.

The context stack

The winning architecture for agentic commerce is a stack, not a single system:

- Knowledge Layer: Proprietary data, policies, and business rules made accessible through managed retrieval.
- Agent Layer: Foundation model-powered agents that reason over the knowledge layer and execute multi-step workflows.
- Tool Layer: APIs, booking engines, payment systems, and operational systems that agents can invoke.
- Human Layer: Escalation paths, oversight, and judgment for cases that exceed agent capability.
- Feedback Layer: Continuous learning from outcomes, corrections, and customer signals.

Like the current ecosystem architecture, most of today's travel shopping has been fully digitized and enabled by a web of business and technology players. The stack will therefore continue to be distributed, with the center of gravity shifting depending on data and

technological capabilities of each player. Today, no player has built a strong, complete orchestration layer yet. The companies that build first - not those with the best models, but those with the best orchestration - will define the next era of travel commerce.

Trainline: Delivered a Multi-Agent Assistant in 5 Months

Trainline's app sees 6B annual ticket sales across 45 countries and helps customers with search, buy, travel and after-care. Trainline wanted to automate these features to provide a better product and scale to 100M+ users. Trainline used Agentic AI services from AWS to build specialist agents to orchestrate responses to customers, answer questions, process refunds, or hand over to a customer service agent. They applied guardrails to prevent toxicity and hallucinations.

Within 5 months, the agentic assistant handled 7 in 8 queries without human intervention and rolled out to 2M+ users.

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PART III. WHAT CHANGES IN THE REAL WORLD

8.0 Customer Experience Stops Being a Funnel and Becomes a Loop

The traditional travel funnel divided the journey into separate stages (inspire, search, book, travel, review), each with its own team, metrics, technology, and budget. This worked when each stage was a distinct interaction, such as a website visit or a phone call, but breaks down when a single AI agent manages the entire journey as one continuous relationship.

From Funnel to Loop

In an agentic world, experience becomes continuous. From inspiration to booking, travel day, and loyalty, all merge into a persistent service loop with memory and recovery built in. For example, the agent remembers that you prefer aisle seats, tracks your loyalty tier across multiple programs, and learns from past reviews to adjust recommendations accordingly. The agent is always on, learning, and ready to act, and the relationship between the traveler and the brand becomes continuous rather than episodic. Dual-memory agents with short-term session state, long-term profile learnings, and a traveler-centered knowledge graph enable the loop.

Anticipatory Travel

The best travel agents don't wait for prompts; instead they use predictive context to act first. "Your London meeting ended early. I've rebooked your flight two hours sooner, arranged a car, and reserved a table near your new gate. Your loyalty points covered the change fee." This shifts the paradigm from reactive to proactive, from search to anticipation. Companies mastering anticipatory travel will define the next era of loyalty - earned not through points and tiers, but through the quality of anticipation: how well the agent knows you, how reliably it acts, and how seamlessly it recovers from problems. Anticipatory travel is only as good as the orchestration layer behind it, specifically to aggregate real-time signals, reason across systems, and coordinate actions before the traveler even knows something changed.

When the Loop Breaks: Recovery as Experience

The true test of the continuous loop isn't what happens when everything goes right, but what happens when everything goes wrong. These are the moments where trust is either earned or destroyed, and where the permission layer becomes real.

Consider a weather-related cancellation. The traveler's morning flight from Chicago to Miami is cancelled due to storms. Before the traveler even receives the airline's notification, the agent has already acted: evaluated alternative routings across four carriers, identified the optimal rebooking that preserves the afternoon meeting, adjusted the hotel check-in time, rescheduled ground transportation, and applied loyalty points to cover the fare difference. The traveler wakes to a single notification: "Your flight was cancelled due to weather. I've rebooked you on an earlier departure that gets you there on time. Everything else is adjusted. Safe travels."

What looks like a simple rebooking required real-time orchestration across booking systems, inventory platforms, payment processors, and loyalty programs, all while maintaining context about the traveler's preferences, constraints, and priorities.

These scenarios represent the operational reality that separates agents that book from agents that save your trip. A traveler who experiences seamless recovery during a crisis doesn't just continue using the service, but would ultimately grant deeper permission, moving from "let the agent search" to "let the agent handle everything" and trusting the loop even when it breaks.

Helping Travelers Amid Disruption with AI-Powered Automation

When flight disruptions hit, airlines must contact tens of thousands of passengers across multiple languages, locations, and time zones — fast. A conversational AI solution centered around Amazon Connect enables proactive, personalized service during disruptions. The system automatically initiates outbound calls to every impacted passenger and crew member, greets them by name, delivers rebooking information in their preferred language, and sends an SMS with a direct link to manage their booking — all without human agent involvement.

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The AI Feedback Loop: Connecting Digital and Physical

Travel is physical - both its greatest strength and biggest operational challenge. These physical tasks require physical presence and represent the industry's largest costs. Embodied AI (whether robots, autonomous systems, and physical automation powered by the same foundation model logic that drives conversational agents) is beginning to change the economics of these operations. The real power of embodied AI is not the robot itself, but in the feedback loop between the physical world and the digital intelligence layer. For example, a robot cleaning a room detecting a broken air conditioner should immediately inform the check-in agents to stop allocating that room. Similarly, if a baggage handling system identifies a damaged suitcase, the customer service agent should proactively reach out before the passenger even lands. The same foundation model logic that powers conversational agents can coordinate physical operations so that the physical systems provide the sensory input and the orchestration layer connects them into a continuous, self-improving loop, so that digital intelligence and physical operations become a single integrated system.

Closing the Feedback Loop with AI

Instead of manually reviewing feedback, teams gain a unified view that connects signals to outcomes, enabling faster, data driven decisions and continuous improvement. By centralizing data from multiple channels and enriching it with AI driven sentiment, categorization, and insights, organizations can quickly identify trends, detect issues early, and prioritize actions that improve customer experience.

Visit [AWS Samples](#) to learn more

9.0 Trust, Privacy, and Regulation are Core Design Inputs

There is a temptation, in the excitement of building agentic systems, to build first and treat trust, privacy, and regulation as problems to be solved later. The regulatory patchwork regarding agents is complex and evolving, but the direction is clear: AI systems that interact with consumers will be regulated, and the companies that build compliance into their architecture from the start will have a structural advantage over those that retrofit it later. In addition to sanctions, non-compliance drastically affects consumer trust, which in the agentic era is the most valuable asset a brand has.

The Regulatory Reality

For C-suite leaders, emerging key requirements to address from day 1 include:

- AI systems must be auditable, explainable, and of course compliant across every jurisdiction.
- Data residency and sovereignty requirements vary by market and are becoming more stringent.
- Liability frameworks for AI hallucinations are still being defined, but the question of who is responsible when an agent makes a false promise is not going away.

The Privacy Paradox

The vision of persistent memory across touchpoints is compelling: An agent that remembers your allergy, your seat preference, your loyalty tier, and your last complaint is a better agent. But in the EU under GDPR and in California under CCPA, the long-term memory of an AI agent is a legal minefield: Who owns the data? How long can summarized preferences be retained? Can the consumer request deletion? What happens when the agent's memory conflicts with the consumer's right to be forgotten? What happens when personalization based on remembered preferences crosses the line into profiling? The companies that build privacy-by-design architectures where agents can personalize without permanently storing sensitive

personal data will have a competitive advantage, and those that ignore them will face regulatory action or consumer backlash.

Sustainability as a Trust Signal

2026 is a pivotal year for climate-conscious travel. Regulators and travelers alike no longer accept minor visible gestures as sufficient signals of environmental responsibility. In addition, data-driven transparency is emerging as the new standard to drive action. AI is uniquely positioned to make sustainability actionable rather than aspirational. Consumers increasingly choose brands that align with their values, and an agent that proactively recommends lower-carbon options builds trust in a way that a marketing campaign cannot. For example, AI-powered platforms can analyze flight, train, and bus options to recommend the lowest-carbon itinerary automatically. The emergence of carbon-neutral travel products, community-led tourism, and regenerative resort models also benefit from AI retailing's flexibility.

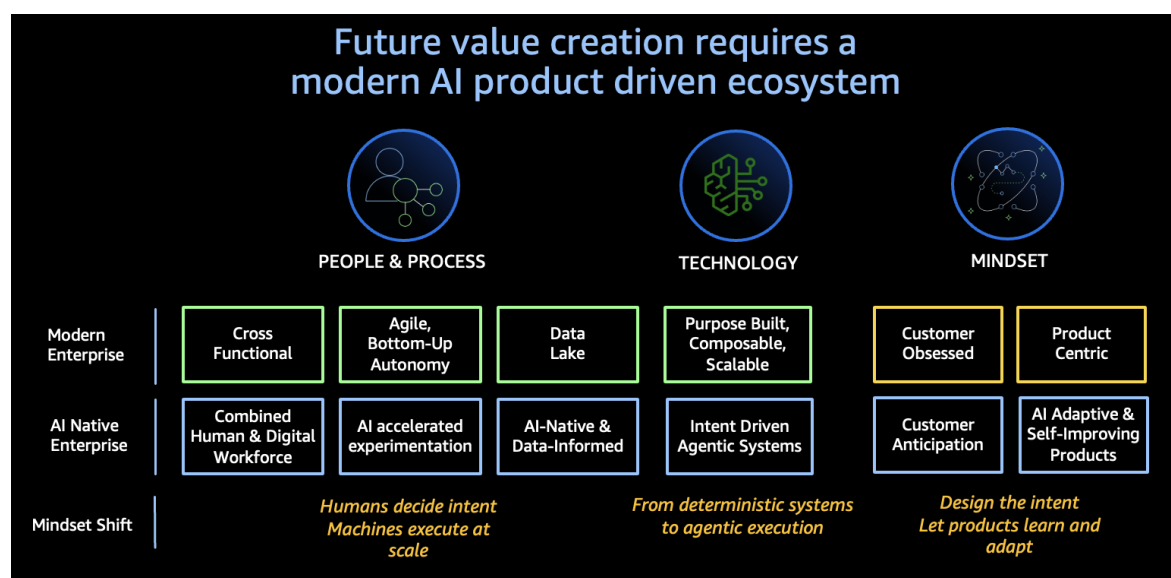
PART IV. HOW LEADERS MOVE NOW

10.0 The Operating Model Becomes the Competitive Moat

Agentic commerce is a cross-functional redesign of how a travel company operates, happening at lightning speed and impacting every department and business process. In the agentic era, the competitive moat is not technology, but speed of execution.

Speed as the Moat

When the market moves in weeks rather than quarters, the companies that can go from idea to production in hours will outpace those that take months. Importantly, the agentic era does not wait for transformation programs, replatforming projects, or change management programs: The muscle of constant change of shipping daily, iterating weekly, and learning continuously is what separates companies that thrive in the agentic era from companies that produce strategy decks about it.



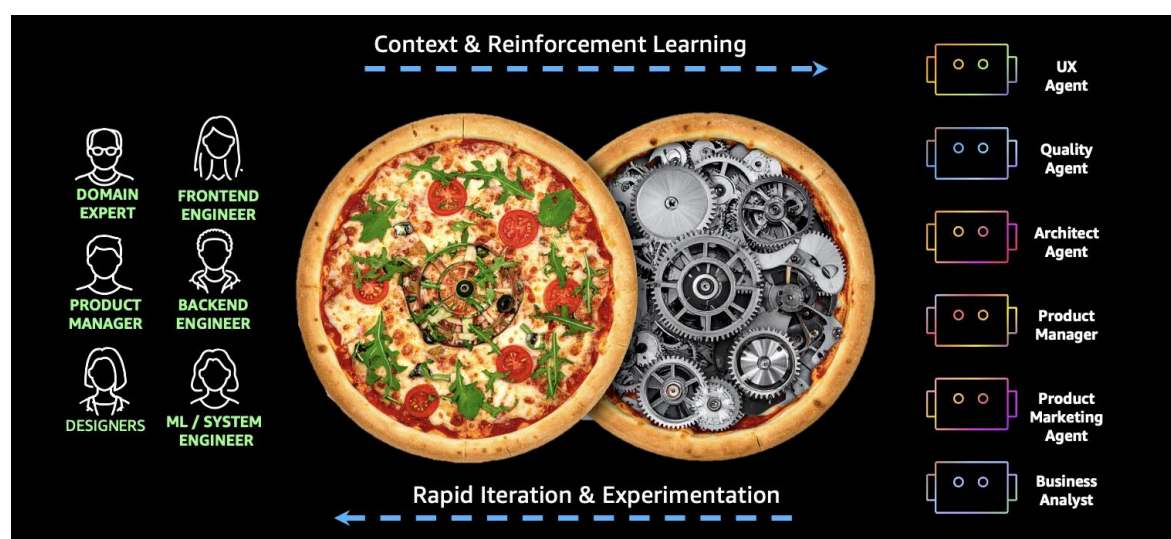
The preferred operating model for value creation under those circumstances is the “two-pizza team” model: Small, autonomous teams that can make decisions at the edge without waiting for hierarchical approval.

The Workforce Transformation

The shift to agentic commerce creates new roles and reshapes existing ones.

Firstly, new roles are emerging: Prompt Engineers who design the instructions that guide agent behavior, Context Engineers who map business knowledge into agent-consumable formats, AX designers who optimize the experience for machine consumers alongside human consumers, or AI Trainers who refine agent performance through feedback and evaluation.

In contrast, existing roles are evolving: Customer service teams are transitioning from handling routine queries to supervising AI agents, intervening in complex cases, and providing empathy and judgment that machines cannot replicate. This hybrid model where AI handles volume and routine while humans handle empathy, exceptions, and high-value interactions is proving more effective than either alone. Travel advisors who understand how to position themselves (expertise, relationships, and insider knowledge) alongside AI are thriving. The cultural shift from "AI will replace us" to "AI makes us more valuable" requires deliberate change management as a strategic capability.



AI augmentation for the two-pizza team

11.0 A 90-Day, 12-Month, and 24-Month Agenda

The companies that move first will build feedback loops that compound their advantage. In contract, companies that wait will find themselves playing catch-up against competitors whose agents are already learning, improving, and earning consumer trust. The exponential nature of AI improvement means that the gap between early movers and late movers widens faster than in any previous technology wave.

90 Days: Audit and Clean

The first ninety days are about honesty: Understanding the current state of data, content, policies, and service journeys before building an agentic commerce capability.

- **Audit machine readability:** Take every piece of content that a customer might ask an AI agent about (room descriptions, fare rules, amenity lists, cancellation policies, loyalty program terms, service recovery procedures). Questions include: Can a machine parse this accurately? Is it structured? Is it current? Is it consistent across channels? Are there contradictions or overlaps?
- **Structure content for AI consumption:** Property descriptions, product catalogs, and policy documents must be structured in formats that foundation models can consume, compare, and cite, including schema markup, consistent taxonomies, machine-readable APIs, and clean metadata.
- **Create a machine-readability measurement process** which includes dashboards auditing GEO performance and the impact of ongoing initiatives.
- **Launch simple agentic interactions:** Deploying initial use cases without waiting for a full orchestration layer will teach more about the gap between demo and production than any strategy document. Example use cases include business travel booking where policies are well-defined, FAQ handling where the knowledge base is clean, disruption management where the decision tree is clear.

12 Months: Build and Launch

The next twelve months are about building foundations and proving the model with real production use cases.

- Launch one machine-readable commerce use case, such as a single booking flow or upgrade use case. The use case should work end-to-end from discovery through booking, payment, and confirmation. The use case should generate metrics that point to weaknesses and gaps: Conversion rate, error rate, latency, customer satisfaction, cost per transaction.
- Launch one service orchestration use case, such as a hotel complaint resolution or loyalty redemption flow and make it fully agent-managed with human escalation for exceptions. Measure the same metrics and learn where agents excel and where they fail, specifically in comparison with their humans peers.
- Invest in the orchestration layer and specifically its architecture, not just models. Architecture is the differentiator.
- Deploy private Retrieval-Augmented Generation (RAG) to protect proprietary data. Ensure your proprietary inventory, pricing, and customer data is accessible to agents without ever leaving your infrastructure, which is the foundation of competitive advantage and regulatory compliance.
- Establish AI governance frameworks, and align AI governance with regulations in local operating markets.
- Define the permissions and *functional contract* of what your agents can and cannot do, can and cannot promise, and when they must escalate to a human. These policies should be both documented and enforced through technical guardrails.
- Build your brand's specialized sub-agent to represent your brand in the primary agent ecosystem: This agent must be able to answer questions about your products, check availability, provide pricing, execute bookings, handle changes, and manage service recovery through machine-readable APIs that other agents can consume.

24 Months: Scale and Compete

The next twenty-four months are about scaling what works and building the capabilities that will define competitive advantage for the next decade.

- Scale identity and payment delegation: Implement tiered agent identity (personal, registered, and anonymous agents) with appropriate trust and pricing models for each. Enable associated payment delegation with appropriate fraud controls.
- Scale memory and feedback loops: Expand from single use cases to full journey coverage. Build persistent memory with appropriate privacy controls.
- Rethink your org for speed: The agentic operating model requires cross-functional teams that can ship daily. The org chart must reflect the agent's view of your brand: one entity, one set of capabilities, one set of rules.
- Integrate sustainability into every AI-powered recommendation, making responsible travel the default and factoring carbon footprint, community impact, and environmental certifications into agent recommendations.
- Build the anticipatory travel capability, moving from reactive search to proactive service. The unified data foundation and persistent memory layer allow to anticipate customer needs before they are expressed. The anticipatory agent earns loyalty that no points program can match.

The ultimate winner will not be the company with the smartest model.

**It will be the company that the consumer trusts and authorizes to
execute actions on their behalf.**

Own the trust. Own the data. Own the orchestration. The rest follows.

*For more information, visit aws.amazon.com, contact your
AWS Account Manager, or [reach out to the authors](#).*

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About the authors



Guillaume Dupont joined AWS in 2025 as a Senior Travel & Hospitality Architect, partnering with the world's largest airlines on their digital transformation journey. His 15-year track record spans AI innovation at travel industry leaders Amadeus, PROS, and Airbus. Guillaume holds a master's degree in Operations Research from the National Civil Aviation University of Toulouse, France, where he continues to share his knowledge as a guest lecturer.



Keith Chaney leads the management and execution of Amazon's most complex, high-impact strategic partnerships, driving AWS adoption across global industries. His work spans Amazon's entire portfolio of business units and subsidiaries, orchestrating cross-organizational initiatives. With over 15 years of experience leading technology and organizational transformations at McKinsey & Company, Google, and Booz Allen Hamilton, Keith brings deep expertise in strategic innovation and enterprise-scale change management. Keith holds an MBA from Carnegie Mellon University and a BSE in Industrial Engineering from Kettering University. He resides in Washington, DC with his wife and two daughters.



Matias Undurraga is an Enterprise Technologist and technology leader with more than 20 years of experience helping organizations use AI, data, and modern cloud platforms to drive innovation. Based in Switzerland, he advises leaders on topics such as generative AI, data strategy, modernization, and digital product development. His work focuses on making complex technology shifts practical, actionable, and tied to real business value.



Christian Wolff is a Solution Architect in the UK Cross-Industry Travel and Hospitality team, specializing in Generative AI adoption and enterprise modernization. He is a lead contributor to the UK Future of Search initiative, which provides thought leadership and guidance to customers on the changing future of optimization and discovery. He has published blogposts and sample code to demonstrate the art of the possible in Generative Engine Optimization.



Moni Panchavadi is the Global Partner Solutions Architect for Travel & Hospitality at Amazon Web Services, based in Atlanta, GA. With expertise spanning cloud and the travel and hospitality industry, Moni drives partner solution strategy and collaborates across AWS's global partner network to deliver meaningful industry solutions for AWS customers.



Massimo Morin joined Amazon in 2017, and he is now Global Head, Travel, AWS for Travel and Hospitality. He brings 25 years of experience in the travel and hospitality industry and has deep knowledge in the travel industry of retailing and digital transformation. Before joining Amazon, he worked for ITA Software as Technical Director, and at Google as Head of BD Travel, EMEA. His core expertise is digital transformation in Travel, airline pricing, distribution, revenue management, customer care, and e-commerce. He graduated in Software Engineering from the University of Venice and acquired a master's degree in the science of Transportation / Airline Business and Management from MIT. Italian by birth, he is based in Boston, and he has a passion for cooking and traveling the world.