



THE AGENTIC TRAVELER:

AI BOOKING DEMAND IS HERE. IS TRAVEL READY?

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Written by
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About the Report

The agentic traveler: AI booking demand is here. Is travel ready?

A PhocusWire Report sponsored by WEX

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Introduction

Artificial intelligence (AI) is rapidly changing how travelers discover, research and shop for travel. Over the past two years, AI has moved from an emerging planning tool to an increasingly influential part of the purchase journey, shaping where travelers go, which brands they choose and where they book.

The next phase is turning AI-driven intent into transactions. Travel companies now need to close the gap between recommendation and booking by building a frictionless path to purchase.

Phocuswright research suggests current AI booking and referral volumes may understate the channel's commercial significance. A meaningful share of travelers is already willing to book through AI, even though the connections between AI platforms, travel inventory and transaction capabilities remain limited. As those gaps close, latent demand could convert into bookings quickly. For travel companies, waiting for AI to account for a significant share of transactions before treating it as a strategic priority risks ceding an emerging distribution channel to competitors that are ready to capture that demand.

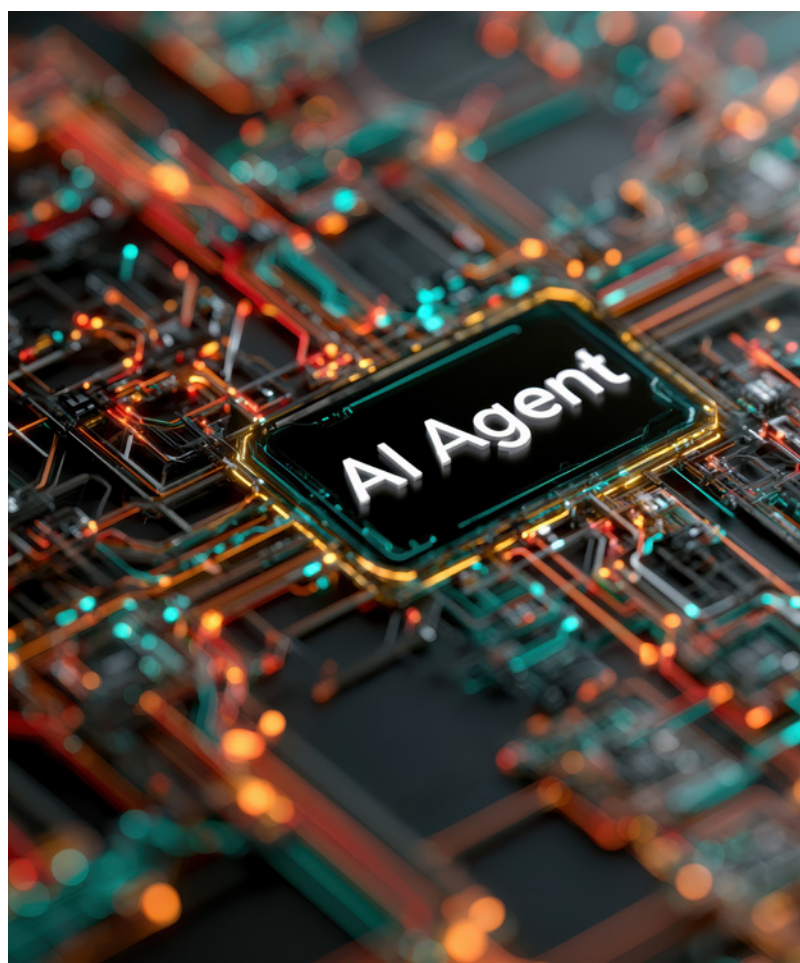
Phocuswright's 2026 consumer research across the United States, the United Kingdom, France, Germany and Japan identified a distinct segment of travelers likely to be at the forefront of AI booking adoption. Throughout this paper, these travelers are referred to as "agentic travelers," representing travelers who agree with at least one of the following statements:

- "I'd let an AI assistant book my flights and hotels online for me (e.g., let it take control of my browser)."
- "I'd book travel inside an AI platform (e.g., submit payment via ChatGPT) as this option becomes available."

This traveler segment represents the leading edge of AI-enabled commerce. Understanding who they are, how

they use AI and what drives their willingness to transact offers an early view of a potentially significant shift in travel distribution. For online travel agencies (OTAs), travel management companies (TMCs), airlines and other travel companies, the commercial implications extend far beyond visibility in AI results. As AI moves closer to the transaction, the companies best positioned to compete will be those prepared to support the full journey from AI-driven demand to completed booking.

"Every platform shift in travel has been decided in the same place: the payment moment," said Jamie Buxton, international CMO at WEX. "Search moved, mobile moved and now AI is moving. The winners will be companies whose infrastructure lets a recommendation become a transaction without friction."



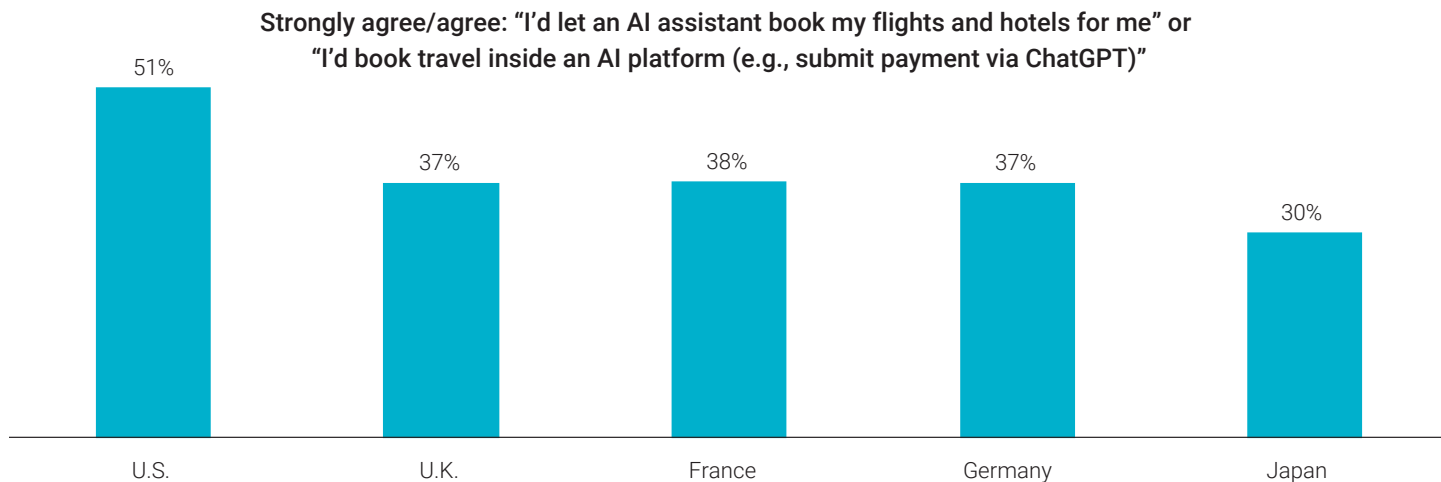
Who is the agentic traveler?

AI in travel exists on a spectrum, ranging from generative AI (gen AI) to emerging agentic AI capable of autonomously planning, booking and transacting travel. Agentic travelers represent the latent demand that already exists for AI booking via any of these methods. While capabilities are still evolving, this segment provides an early view of the travelers most likely to embrace AI-enabled travel transactions as they become available.

Agentic travelers represent a measurable share of the traveler population in each of the countries surveyed, although incidence varies by market. More than half of U.S. travelers (51%) say they would book inside an AI platform or let an AI assistant book flights and hotels for them.



Figure 1: Agentic traveler incidence by market



Note: "Agentic travelers" are travelers who agreed or strongly agreed with either statement listed below.

Question: Please rate how much you agree or disagree with each statement below when it comes to leisure travel. I'd let an AI assistant book my flights and hotels online for me (e.g., let it take control of your browser); I'd book travel inside an AI platform (e.g., submit payment via ChatGPT) as this option becomes available

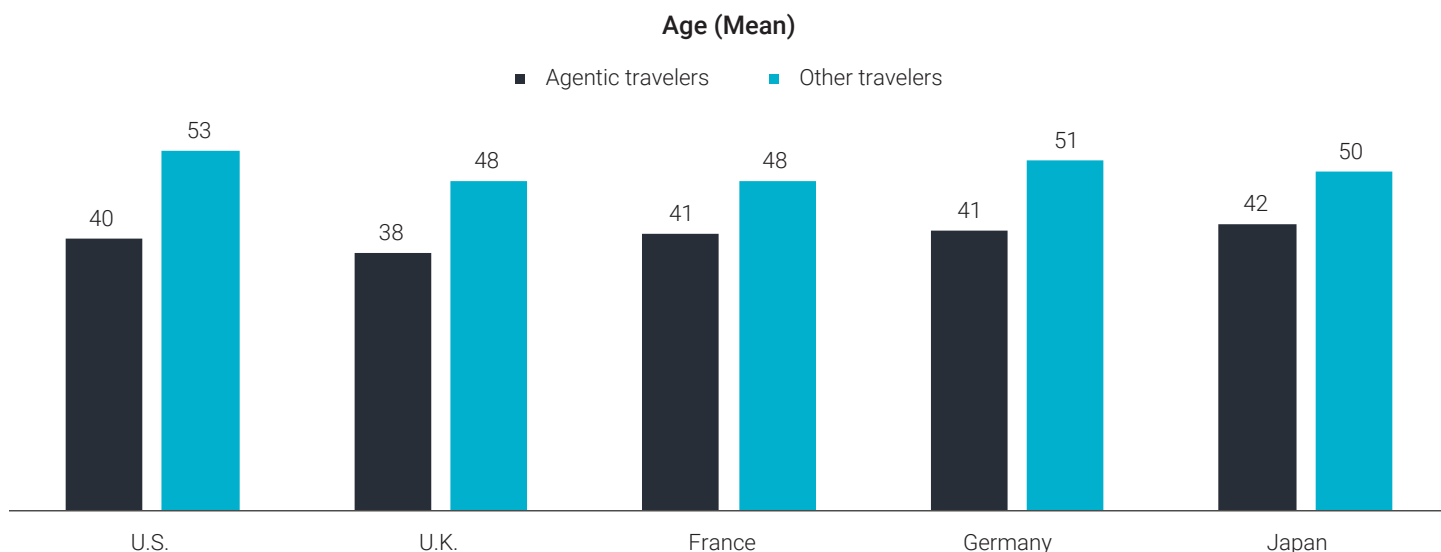
Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

Adoption is lower but still substantial in Europe, where roughly four in 10 travelers in France (38%), the U.K. (37%) and Germany (37%) express a willingness to transact through AI. Agentic traveler incidence is lowest in Japan at 30%. Willingness to transact through AI is not confined to a single geography, but signals a rapid, multi-region shift in consumer behavior.

Age is among the characteristics that set this group apart. Across all five markets, agentic travelers are roughly a decade younger than other travelers, with an average age ranging from 38-42. Unlike some digital adoption trends that initially gain traction among the youngest adult travelers, early interest in AI-enabled travel transactions is strongest among travelers aged 25-44, who may be more established in the workforce and making significant travel purchasing decisions.

Figure 2: The agentic traveler skews a decade younger



Question: Please enter your age below:

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

The segment's trip behavior reinforces its significance. Agentic travelers average more leisure trips per year, and average annual travel spend is roughly equal to or higher than other travelers across markets. The largest gap is in the U.K., where agentic travelers spend an average of £5,207 annually, compared to £3,538 for other travelers.

In the U.S., where agentic travelers make up a larger share of the traveler population, average annual spend is more similar to other travelers. Across markets, however, agentic travelers consistently outspend others on in-destination purchases such as dining, local transportation and shopping.

Figure 3: Agentic traveler trip profile

Market	Average Annual Travel Spend (Trip components)	In-Destination Spend (Food, drink, transportation, souvenirs)	Average Leisure Trips Taken
U.S.	\$6,655 (vs. \$6,789)	\$3,009 (vs. \$2,008)	3.6 (vs. 3.2)
U.K.	£5,207 (vs. £3,538)	£2,278 (vs. £1,352)	3.8 (vs. 3.2)
France	€3,622 (vs. €3,573)	€1,737 (vs. €1,120)	3.7 (vs. 3.3)
Germany	€4,767 (vs. €4,180)	€2,147 (vs. €1,444)	3.6 (vs. 2.8)
Japan	¥382,519 (vs. ¥366,222)	¥237,050 (vs. ¥177,621)	3.8 (vs. 3.3)

Note: All markets represented in local currency.

Question: Approximately how much did your household spend in total for your [pipe in A-1 response] leisure trip(s)? Please only include spend on travel components such as airline tickets, paid accommodation, car rentals, cruises, railway tickets to your destination, and in-destination activities (e.g., museums, theme parks) requiring tickets or admission fees, and exclude any spend on food or drink. Please enter a whole number without decimal points or commas. Approximately how much did your household spend in total while in-destination (that was not considered part of your trip component spend) for your [pipe in A-1 response] leisure trip(s)? Please only include spend on items such as food or drink, in-destination transportation or souvenirs. Please enter a whole number without decimal points or commas. How many total leisure trips did you take that included air travel, paid lodging, cruise, rail, rental car or motorhome travel?

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

Together, these findings suggest that the travelers most willing to embrace AI-enabled transactions are not simply those who enjoy experimenting with new technology; they also represent a commercially important segment of the market. AI-enabled booking does not have to reach universal adoption to drive meaningful travel demand. That demand already exists; the opportunity now is to build the capabilities required to capture it.

For OTAs and TMCs, the rise of AI-enabled bookings creates both opportunity and risk. Those who make it easy for travelers to move from AI-driven planning to booking are positioned to capture demand in this emerging distribution channel. Those who fail to prepare for the shift in distribution risk losing share to platforms that offer a more seamless path to purchase. Airlines and other suppliers face a similar challenge as new intermediaries and platforms emerge and AI plays a larger role in deciding which products are surfaced, considered and ultimately booked. Across the industry, the stakes are not simply about visibility in AI, but about who captures the transaction and retains the customer relationship.

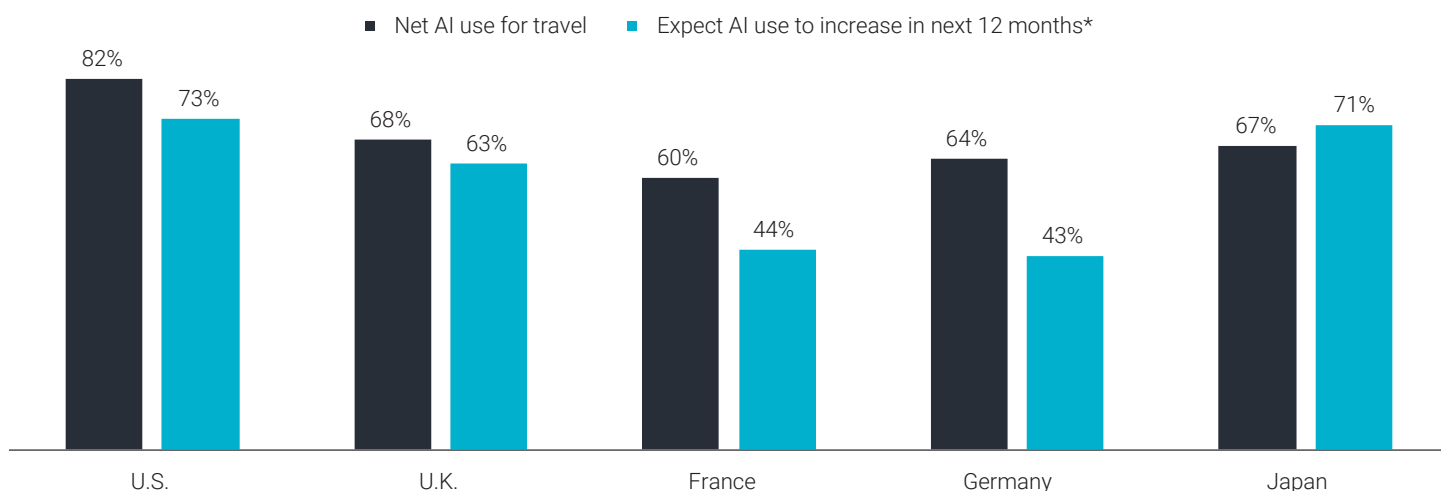


How agentic travelers use AI

Agentic travelers' willingness to transact through AI is part of a broader pattern of adoption. Across markets, they report substantially higher AI use for travel than other travelers across research, planning, booking and in-destination assistance. Additionally, these travelers are more likely to expect their AI use to increase over the next 12 months.

Current adoption is especially high in the U.S. where more than eight in 10 agentic travelers (82%) use AI for travel and more than seven in 10 (73%) expect to grow their use in the coming year. Across European markets, net use and intent is highest in the U.K., at 68% and 63%, respectively, while in Japan roughly seven in 10 agentic travelers (67%) use AI for travel and a similar share (71%) expect to increase usage. Even in France and Germany, where overall adoption and intent is relatively lower, agentic travelers are more likely than others to expect to increase their use of AI in the future.

Figure 4: Current and future AI use among agentic travelers

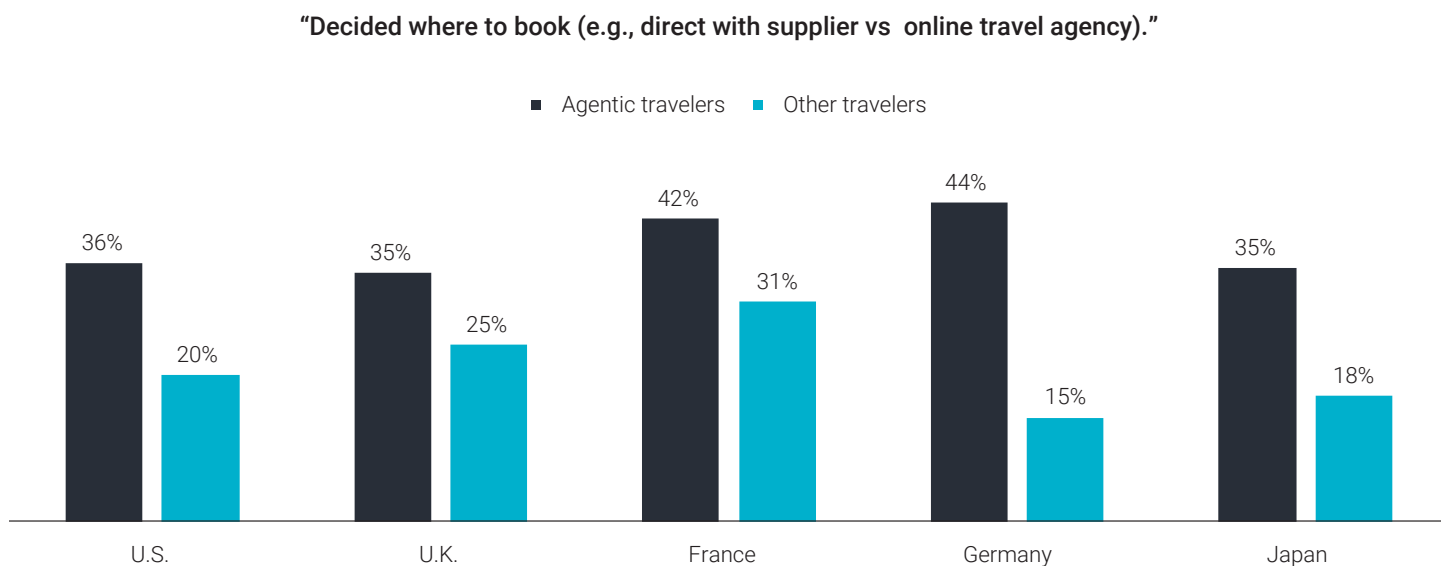


*Increase significantly/somewhat

Question: Which of the following online resources do you typically use while researching/selecting travel components for your trip(s)? Select all that apply. What online source(s) did you use when researching in-destination activities? Select all that apply. For how many of the [] leisure trip(s) you took in the last 12 months did you use AI to assist with trip planning, booking or in-destination assistance? How do you expect your use of AI for travel to change over the next 12 months?

Base: Agentic travelers (U.S. N=763; U.K. N=159; France N=153; Germany N=155)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

Figure 5: AI influence on trip decisions: Booking channel


Note: Represents travelers who agreed or strongly agreed with either statement listed below..

Question: Did you make any specific trip decisions based on information you received from AI? Select all that apply.

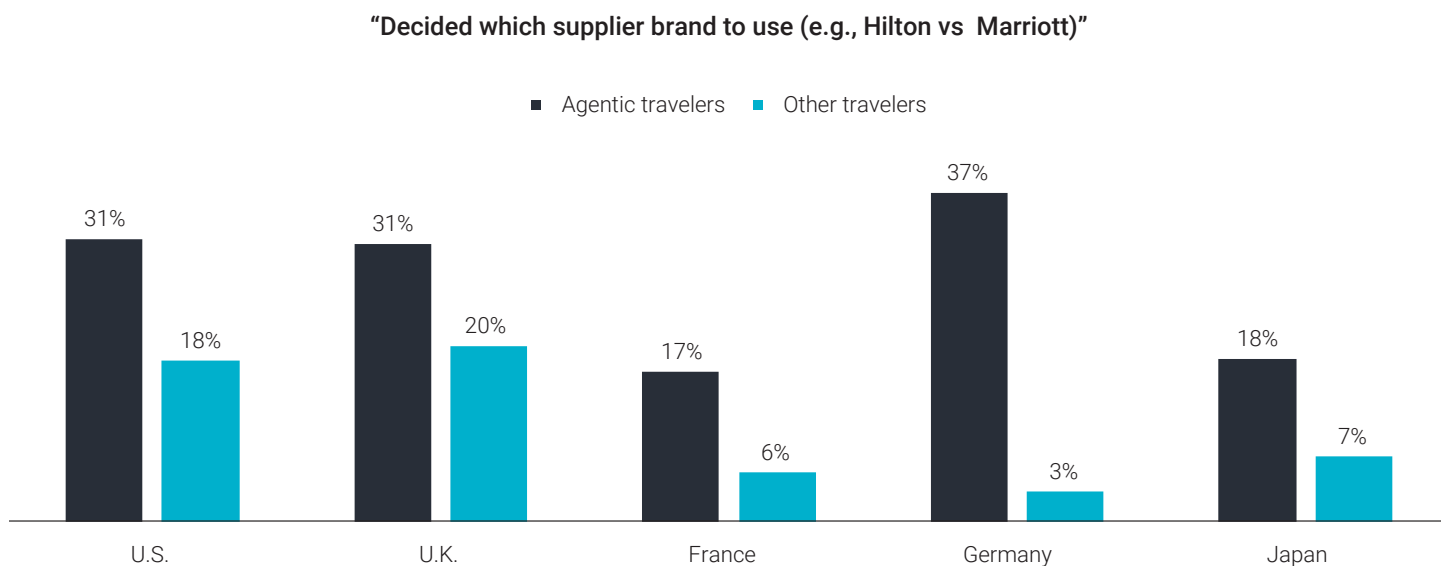
Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

This high engagement with AI is already influencing how these travelers make purchase decisions. Compared with other travelers, agentic travelers are significantly more likely to report that AI has influenced where they book travel, whether directly with a supplier or through an intermediary.

These travelers are also more likely to indicate AI influenced their choice of supplier brand. The influence gap is particularly pronounced in Germany, where information received from AI was much more likely to influence trip decisions for agentic travelers versus others for both booking channel (44% vs. 15%) and supplier brand (37% vs. 3%).

These findings suggest that AI is already shaping not only how agentic travelers discover and research travel options, but which products and distribution channels they choose. Because AI platforms and recommendation engines may not be tightly integrated with booking capabilities and traditional booking channels, AI's growing influence may be difficult to identify in referral or booking data. Travel companies that wait for AI to represent a significant share of directly attributable bookings may underestimate how quickly the shift in consumer behavior has already progressed.

Figure 6: AI influence on trip decisions: Supplier brand


Note: Represents travelers who agreed or strongly agreed with either statement listed below..

Question: Did you make any specific trip decisions based on information you received from AI? Select all that apply.

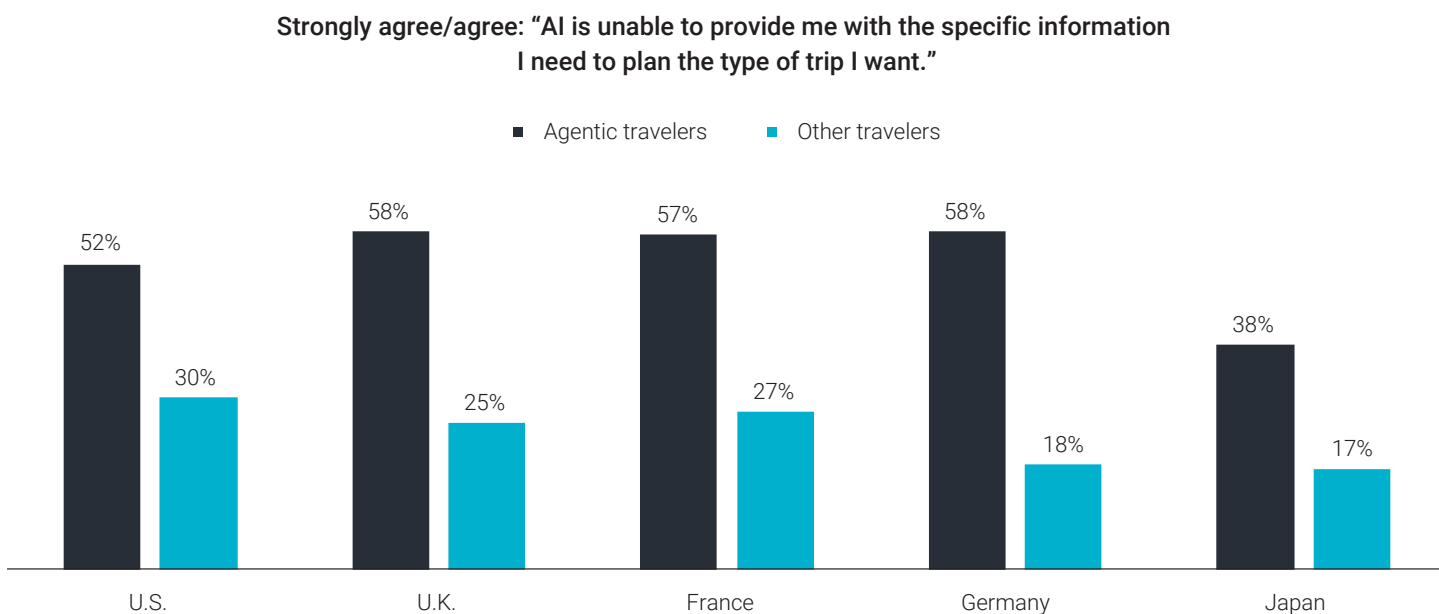
Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026



However, agentic travelers are not naïve about AI's capabilities. These travelers are clear-eyed about AI's limitations—but they are eager to use it regardless. Across every market, a significant share of agentic travelers agrees that AI is unable to provide the specific information they need to plan the type of trip they want. In fact, they are much more likely to agree with the statement compared to other travelers. These findings point to a nuanced relationship with AI. Agentic travelers recognize the technology's current limitations but continue to see sufficient value to incorporate it into their travel planning. Travel companies that wait for AI experiences to become fully mature risk missing opportunities that are already emerging.

Figure 7: Agentic travelers embrace AI despite its limitations



Note: Represents travelers who agreed or strongly agreed with either statement listed below..

Question: Please rate how much you agree or disagree with each statement below when it comes to leisure travel.

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

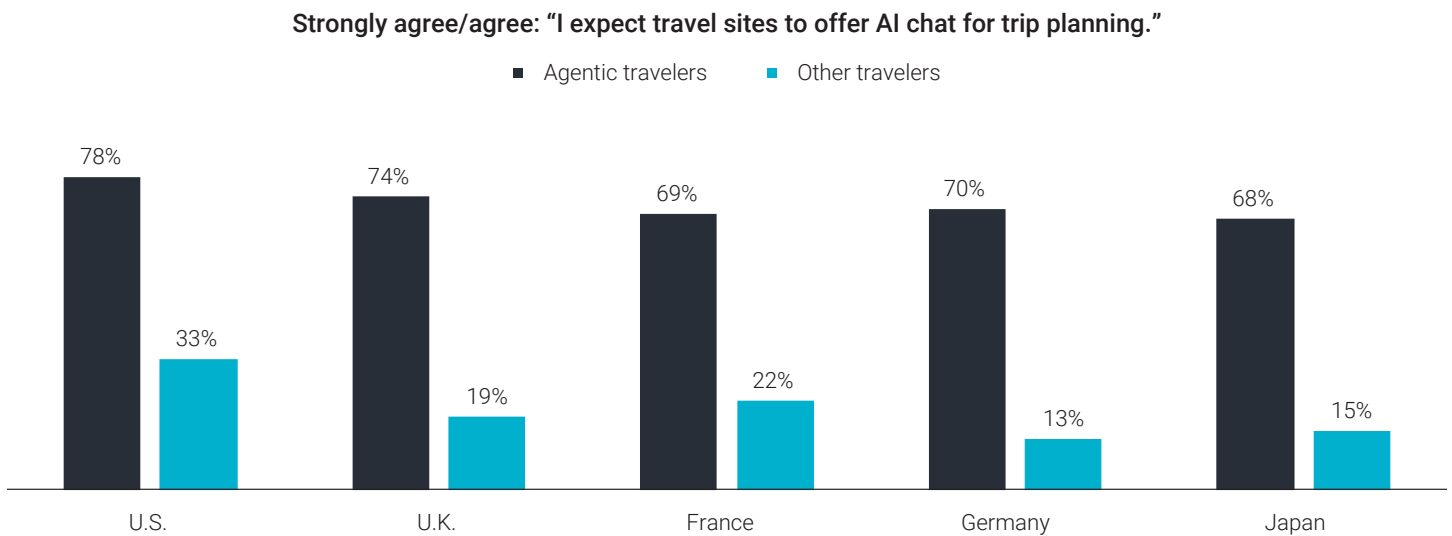
Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

For travel brands, improving the information available to AI is not only about boosting visibility. Discoverability is the first step in an emerging commerce journey. As AI plays a larger role in purchase decisions, the quality and accessibility of travel content will influence which products are recommended; the ability to connect those recommendations to bookable inventory and a seamless transaction will determine how effectively that influence converts into revenue.

Despite AI's current weaknesses, agentic travelers view the technology as a nascent but essential part of the travel planning process. Across all five markets, roughly seven in 10 agentic travelers say travel brands should offer AI-powered chat to help travelers plan and book trips, far exceeding the expectations of other travelers. Brands that fail to provide AI-enabled experiences risk losing influence over both travelers' decisions and the transactions that follow.



Figure 8: AI is viewed as a “must-have” for travel brands.



Question: Please rate how much you agree or disagree with each statement below when it comes to leisure travel.

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026



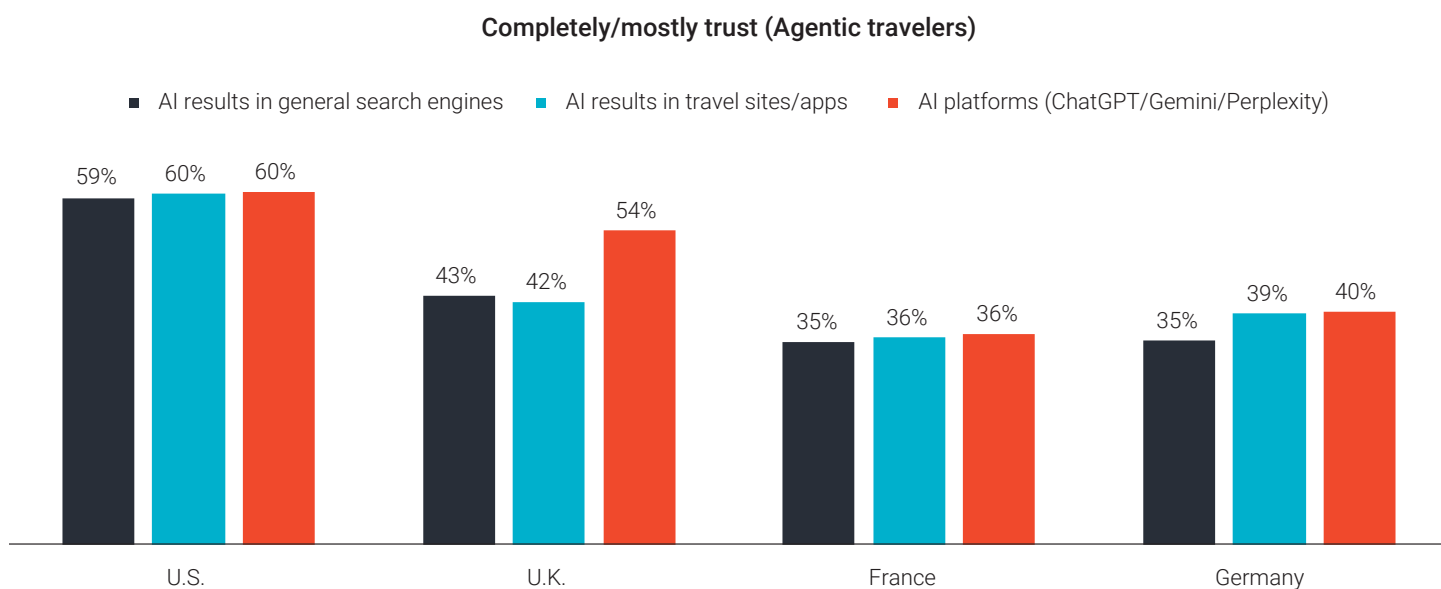
The competitive question is no longer just whether a brand can be found and recommended through AI. Rather, the winning brands will be those that enable travelers to act on that recommendation immediately. Companies that solve only for AI discovery risk ceding the transaction to competitors that have optimized their product offerings and commercial relationships for AI discovery and personalization—and enabled a frictionless path to booking.

Trust is at the core

Trust is often a factor in determining whether—and when—consumers adopt emerging technology, particularly when adoption hinges on sharing financial and personal information. Agentic travelers are distinct in their willingness to trust AI.



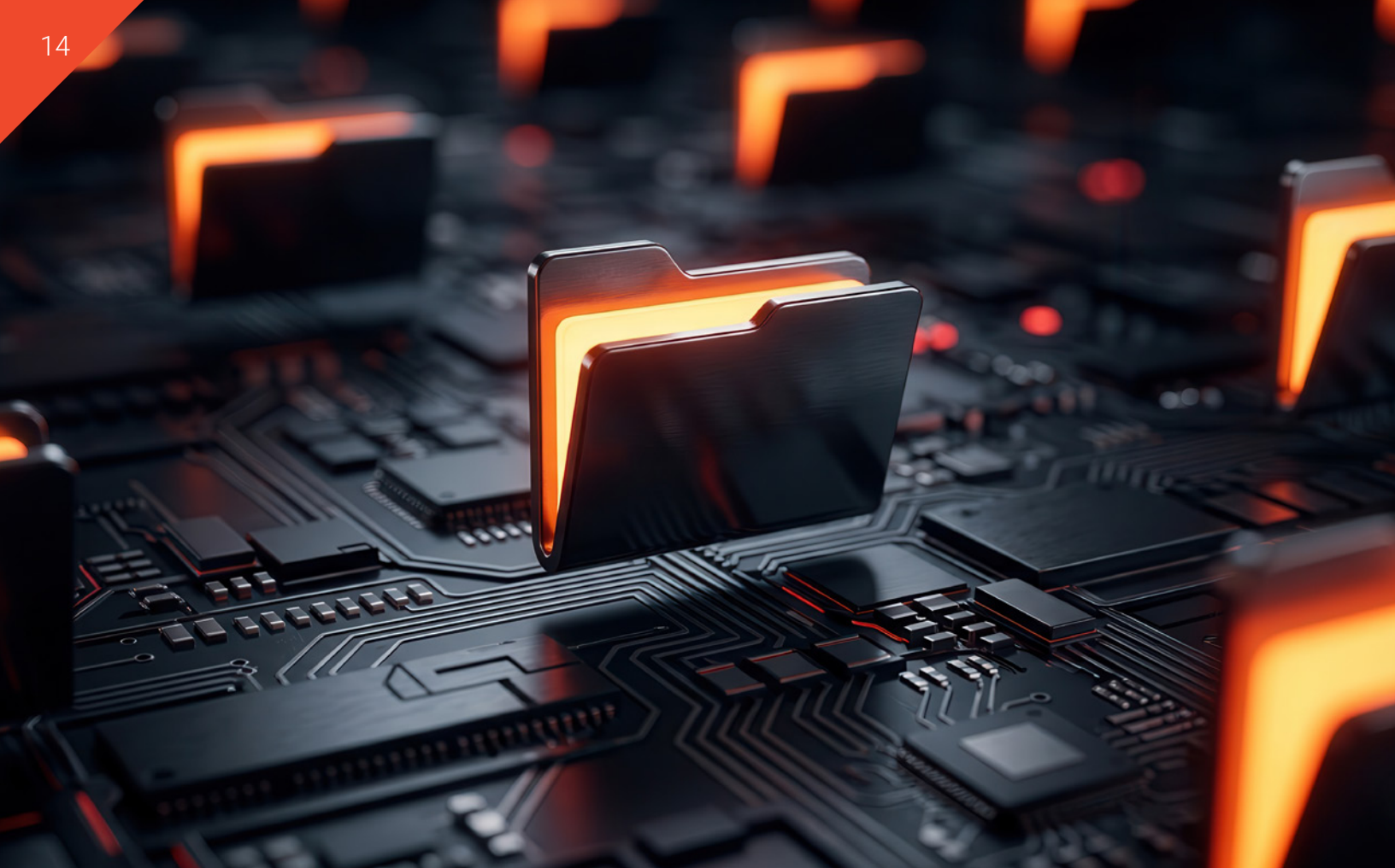
Figure 9: Agentic travelers are much more likely to trust AI across platforms



Question: Thinking about all the resources available for planning and booking a trip, how much do you trust each of the options below?

Base: Agentic travelers (U.S. N=763; U.K. N=159; France N=153; Germany N=155)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026

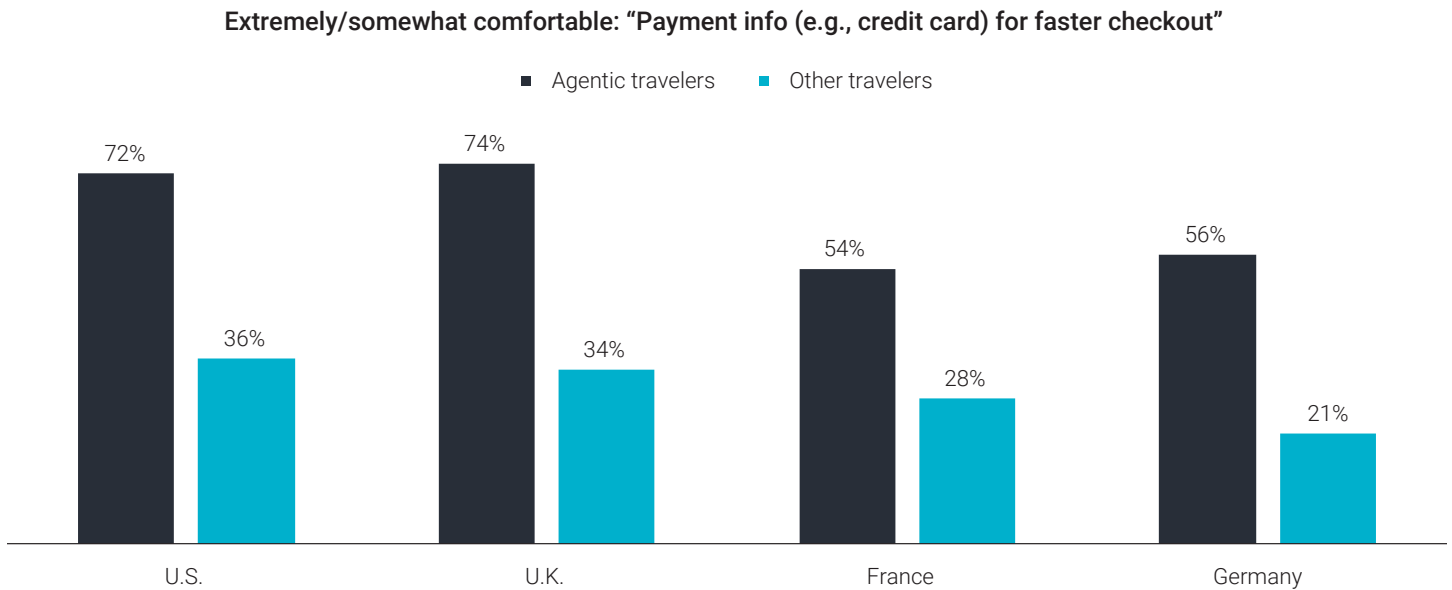


Across markets, the traveler segment is much more likely to trust AI compared to other travelers, and that trust extends across AI platforms, AI search and AI results in travel sites/apps. Trust incidence is highest in the U.S., followed by the U.K., where agentic travelers are particularly likely to trust AI platforms. For the travelers most willing to embrace AI, trust resides less in a specific interface than in AI as a decision-support tool, creating multiple pathways through which the technology can influence travel planning and booking decisions.

While agentic travelers lead in both adoption and trust, other travelers are much less likely to trust AI, regardless of channel. The trust gap is widest in the U.S., U.K. and France. In the U.K., for example, 54% of agentic travelers say they trust AI platforms, compared to 9% of other travelers; forty-two percent trust AI results in travel websites/apps compared to 5% of others.

But the trust gap is not solely about AI. Agentic travelers are also much more likely to be comfortable sharing the information needed to complete a transaction or to provide more personalized service.

Compared with other travelers, they are more likely to be comfortable allowing travel companies to securely store payment credentials and to provide personal preferences to enable more relevant recommendations. Additionally, agentic travelers are more willing to share their location during a trip to receive contextual assistance and real-time recommendations. These behaviors matter because AI-enabled commerce depends not only on confidence in the recommendation, but on traveler's willingness to provide the information and authorization needed to act on it.

Figure 10: Comfort with stored payment information

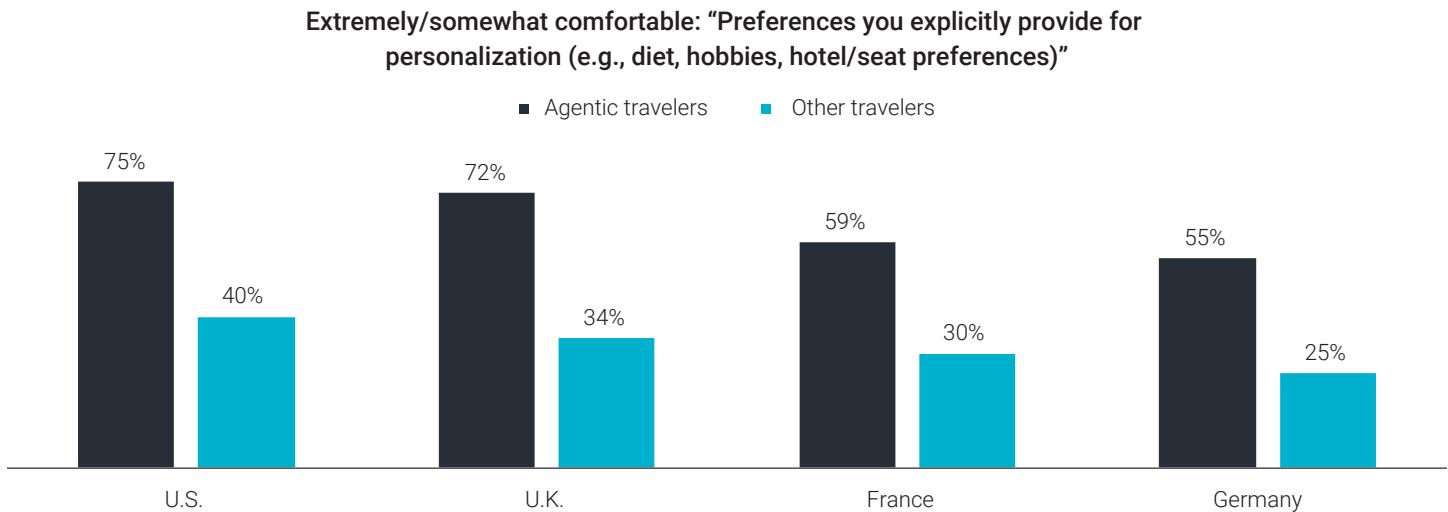
Note: Represents travelers who agreed or strongly agreed with either statement listed below..

Question: How comfortable are you having travel companies store and/or utilize each of the following types of information?

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026



Figure 11: Comfort with personalization

Note: Represents travelers who agreed or strongly agreed with either statement listed below.

Question: How comfortable are you having travel companies store and/or utilize each of the following types of information?

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026

These attitudes and behaviors suggest that, for a significant portion of the traveler population, trust is not the primary barrier to AI-enabled commerce. Agentic travelers are already comfortable with many of the data-sharing, personalization and payment behaviors required to support a transaction.

“Travelers are telling us they will let an agent hold their card and complete the booking,” said Jason Hancock, managing director of global travel for WEX. “That is a privilege the industry has to earn on every transaction—with identity, authorization, fraud and dispute frameworks designed for agent-initiated payments. Getting the controls right is how this channel scales safely.”



What travel brands can do now

While AI is already a powerful marketing channel, it is also an emerging booking channel with the potential to reshape travel distribution. Travel brands should not wait until AI-generated bookings represent a significant share of revenue before responding. AI is already shaping travel demand, and a meaningful segment of travelers across markets is ready to transact. Travel companies that want to capture that demand need to build the full path from discovery and recommendation through booking and payment now.

The technology foundation needed to support this shift is developing rapidly. Interoperability protocols and standards, including model context protocol (MCP), Agent2Agent (A2A) and Google's WebMCP, are creating the framework that will enable AI agents to discover travel products, exchange information and complete transactions across providers.

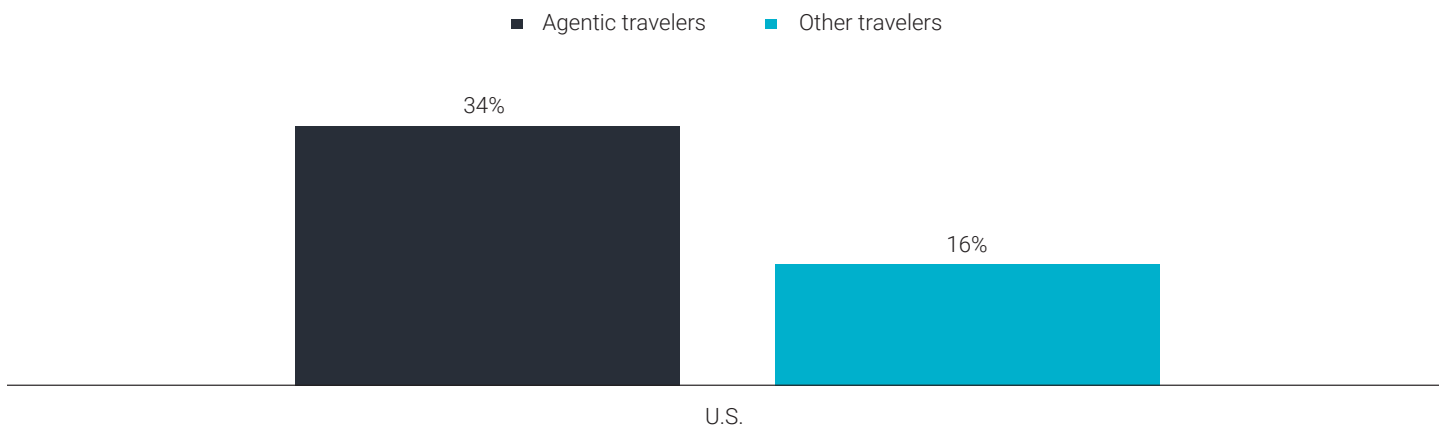
According to Phocuswright's [Budgets, Barriers and the Race to Agentic AI](#), industry stakeholders recognize that scaling AI will require investment in the interoperability

and integration needed to support AI-enabled commerce. Yet the same travel executives cite "stronger evidence of return-on-investment (ROI) and business impact" as the top priority for accelerating adoption of gen AI across the travel industry. The agentic traveler findings provide an important piece of that business case: a sizable, commercially valuable traveler segment is already using AI, allowing it to influence purchase decisions and expressing willingness to transact through it.

Reducing friction between AI recommendations and completed bookings should be a priority. U.S. agentic travelers are more than twice as likely as others to say the "ability to book immediately" would increase their likelihood to act on AI recommendations.

"For marketers, that means the funnel no longer ends on your website—it ends inside the conversation," said Buxton. "Every extra step between intent and payment is measurable leakage, and the brands that close that gap first will take share while everyone else debates attribution."

Figure 12: Share who say “ability to book immediately” would increase likelihood to act on AI recommendations



Question: When AI makes a trip recommendation (hotel, flight, activity, etc.), what does or would most increase your likelihood to act? The recommendations could be any place you interact with AI including, but not limited to, search engines, AI platforms or travel sites/apps. Select up to three.

Base: U.S. (N=1,482)

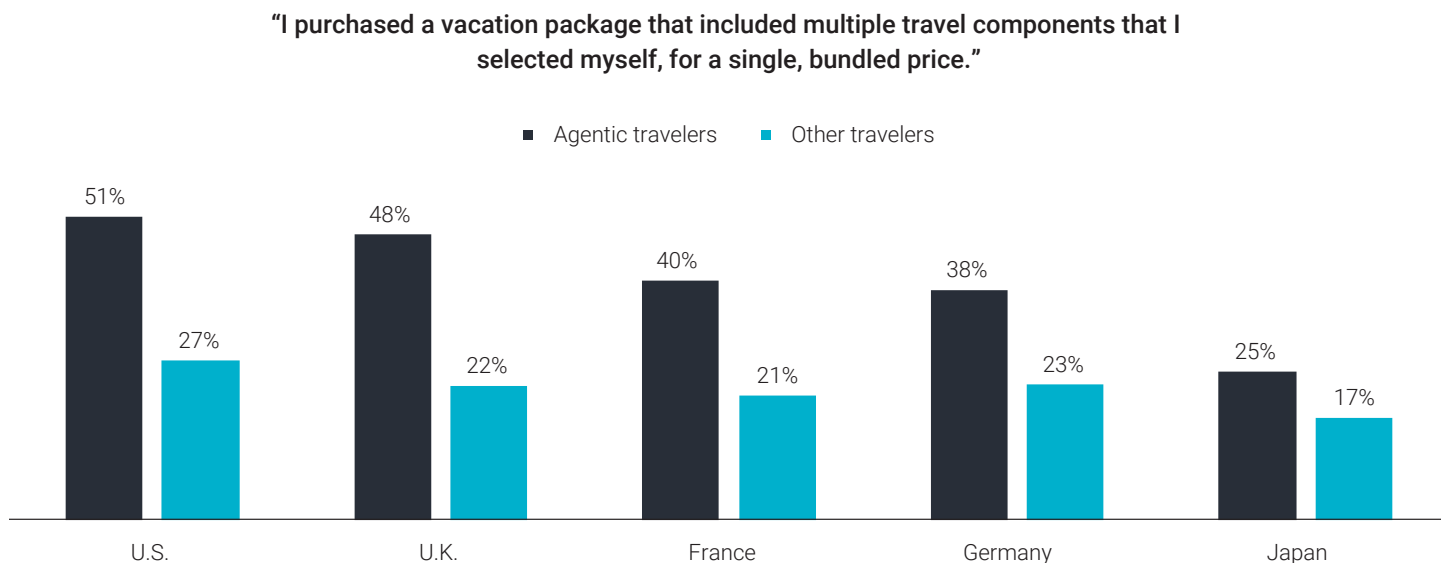
Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026

AI also creates opportunities for more personalized and dynamic forms of travel commerce. Agentic travelers are consistently more likely than other travelers to purchase dynamic vacation packages that combine multiple travel components into a single itinerary. As AI becomes better able to understand traveler intent, it can potentially assemble increasingly relevant combinations of flights, accommodations, ground transportation, activities and other trip components.

Delivering that experience, however, requires more than personalized AI recommendations. The companies facilitating the booking must also be able to transact efficiently with the suppliers that fulfill each component. Effective B2B payment, settlement and reconciliation capabilities can therefore expand the range of inventory and experiences that travel platforms are able to bring together. For the traveler, the infrastructure may remain largely invisible; its value is reflected in greater choice, more relevant packages and a more seamless way to purchase the trip.



Figure 13: Agentic travelers are more likely to purchase dynamic vacation packages



Note: Represents travelers who agreed or strongly agreed with either statement listed below.

Question: How did you purchase travel components (e.g., airline tickets, paid lodging, car rental, rail tickets) for your [pipe in A-1 response] leisure trip(s)? Select all that apply. I purchased a vacation package that included multiple travel components]

Base: U.S. (N=1,482); U.K. (N=425); France (N=407); Germany (N=414); Japan (N=718)

Source: Phocuswright's U.S. Consumer Travel Reports 2025-2026, Phocuswright's Europe Consumer Travel Reports 2025-2026, Phocuswright's Japan Consumer Travel Report 2026

AI-enabled commerce also depends on making travel products and booking capabilities accessible to AI agents. Product descriptions, pricing, availability and policies should be structured so agents can accurately discover and compare options, while inventory and transaction capabilities must be accessible when the traveler is ready to book. Payment authorization, identity verification, fraud controls and dispute management must also function reliably when an AI agent participates in or initiates a booking on a traveler's behalf. The objective is not simply AI readiness at the top of the funnel, but transaction readiness across the entire commerce journey.

Travel brands will also need to consider how loyalty, traveler preferences and customer recognition carry across AI-enabled transactions. Whether a booking originates from a website, mobile app or AI assistant, brands will need to deliver a connected customer experience while determining how personalization and loyalty should function across channels.

Travel companies should also improve how they measure AI's role in the customer journey. Direct referral and booking volumes may understate the full impact, making better measurement of AI-assisted activity important for assessing the channel's commercial value and guiding continued investment.

The agentic traveler segment shows that meaningful demand for AI-enabled commerce already exists. The opportunity now is to close the gap between traveler intent and transaction by connecting AI more seamlessly with travel inventory, booking and payment. Travel companies that build the infrastructure to support that journey now will be best positioned to capture demand as AI reshapes travel distribution.

Conclusion: From intent to transaction

The evidence across five markets points in one direction. A sizable, younger and commercially valuable traveler segment—more than half of travelers in the U.S., roughly a third or more in the U.K., France, Germany and Japan—is ready to let AI not only shape travel decisions but complete them. These travelers already use AI more than their peers, allow it to influence where and with whom they book and extend it the trust and data access that transactions require.

The constraint on AI-enabled travel commerce is therefore no longer traveler willingness; it is industry readiness. The work ahead spans the full journey this paper has traced:

content that AI agents can read, inventory they can book and the payment, identity and dispute capabilities an agent-initiated booking demands. That trust, as Hancock notes, “is a privilege the industry has to earn on every transaction.”

And it will reward those who build before the booking data demands it. As Buxton observes at the outset of this paper, every platform shift in travel “has been decided in the same place: the payment moment,” and the winners will be those “whose infrastructure lets a recommendation become a transaction without friction.” The agentic traveler is ready to transact. The advantage now belongs to the travel companies ready to meet them there.





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