AUTOURA

AI and the end of the traditional fixed-itinerary tour

15 predictions on how sightseeing will change over the next decade

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CYBORGUIDE

Introduction

AI will make the traditional fixed tour itinerary — the format underlying both day tours and multi-day journeys — increasingly irrelevant, replacing it with personalised, adaptive experiences designed and operated in real time.

In this vision I'll set out 15 predictions for how sightseeing will transform over the next decade: what will disappear, what will emerge, and how the industry itself will change.

To see how we got here: I launched TourCMS in 2003 and by 2008 had built the first SaaS-based reservation platform for tour operators. In 2012 we made the next leap with API-enabled distribution, opening up Gray Line's products to major distributors such as GetYourGuide, Expedia, HotelBeds, Veltra and TourRadar — marking those distributors' first move away from extranets and spreadsheets. Those two breakthroughs — SaaS and API-enabled distribution — became the foundations the global sightseeing industry still runs on today.

Having sold TourCMS to Palisis just before the pandemic, I turned to a third big idea: AI sightseeing — personalised, adaptive experiences powered by real-time intelligence. I first laid this out in 2018 as the "auto-tour." The name didn't stick, but the concept did — and with Autoura we've been building the foundations for this next shift ever since.

This isn't a distant future — this next shift will be faster and more disruptive than the move to online booking or SaaS reservation tech, because this time it's not just how tours are sold that's changing — it's the tours themselves. And unlike other industries where adoption means breaking entrenched habits, travel is already a context where people expect novelty. When travellers are away from home, they're in the mindset for new experiences, so embracing an AI-led journey won't feel like disruption — it will feel like part of the adventure, at least until AI itself becomes mainstream.

Much of a traveller's day is already self-guided — a fixed tour might fill a few hours, but the rest is pieced together through phones, maps, apps, and reviews. AI won't demand new consumer behaviour; it will enhance the existing one, with the traveller's AI gradually curating more of the addressable sightseeing time outside the hotel into something adaptive, connected, and personalised. Eventually, on-demand intelligence will become so capable that fixed-itinerary tours will no longer be needed.

For operators, tech companies, and destinations, the winners will be those who adapt early, building for a world where travellers design their own journeys in partnership with AI, and where value comes from unique inputs rather than pre-packaged itineraries.

It can be hard to see the full scale of what's coming when looking at individual AI announcements or the latest social media posts that explore one narrow angle. Each shows a fragment, but taken together they reveal a much bigger shift — not an incremental change but a systemic transformation in how sightseeing is designed, delivered, and experienced. So here, in the time it takes to drink a cup of tea, is my vision for the future of sightseeing — and how humans will be augmented by AI, not replaced by it, with human connection remaining at the heart of the experience.

For those who want to go deeper, see the appendix: I've included The Touring Test (first presented in 2024), a framework for measuring when AI tour guides reach or exceed human-equivalent quality; an updated industry structure diagram (originally set out in 2022); and a section on why evolution won't work, outlining the systemic reasons incumbents won't be able to make the shift.

Now I'm asking you to take that leap again — just as we did with SaaS and API-enabled distribution. The AI era demands new foundations, and we have to build them together.

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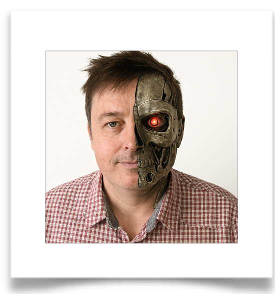

To the sightseeing AI entrepreneurs of 2035: This was written way back in 2025, before the great robot uprising of 2030. Please score my predictions kindly.

15 predictions for the next decade of sightseeing

1 - Personalisation will be the baseline

From the very first touchpoint — whether in itinerary design, on arrival, or at the earliest stage of inspiration — the intermediary's AI will begin shaping the experience. Using privacy-preserving standards like the emerging Hospitality & Travel Profile (HATPro), built on decentralised identity, travellers will be able to share preferences and requirements in a structured, controlled way.

This ensures the AI can adapt the journey in real time — from language to mobility needs, food likes and dislikes, or topic interests such as history, art, or sport. The combination of intelligent inference and explicit, traveller-controlled input will make every journey feel bespoke.

Learn more about the HATPro standard: https://htwg.identity.foundation/

2 - The traditional pre-AI tour will disappear

The era of rigid, pre-set itineraries will end. Once an experience begins, it won't be locked in — it will adapt continuously in response to weather, availability, unexpected events, or a change in mood. AI will make these adjustments seamlessly in the background, so the experience feels natural and perfectly timed, without the constraints of a traditional, unchanging tour. This applies to all types of tours — whether walking, cycling, museum-based, or involving transport.

Where transport is needed, autonomous vehicles will play a central role, enabling smaller, more flexible, and on-demand options that replace the rigidity of current tour buses and fixed schedules, making truly personalised journeys possible.

3 - Itinerary design moves to the traveller

Control of itinerary design will shift from suppliers to a collaboration between the traveller and the intermediary's AI. Instead of suppliers presenting dozens of tour options, as is common today, the AI and traveller will co-create the one perfect day, tailored to their preferences.

As a result, the traditional distribution funnel will flip — from a supplier-led discovery process to an AI-led design process — removing decision fatigue and putting the traveller at the heart of the experience.

4 - The scale of impact will surprise many

The shift to AI–designed, adaptive experiences won't just affect tours — it will touch every kind of interaction a traveller has. From restaurants and attractions to expert-led sessions — like a chef's cooking class or a winemaker's tasting — and even outdoor activities, each interaction will be framed, scheduled, and narrated by AI. The system will decide when travellers arrive, how long they stay, the story they hear, and how your moment fits into their wider day.

For many providers, the real shock won't be the disappearance of fixed tours, but the loss of control over timing, storytelling, and customer contact. Even if you don't sell "tours," the way travellers interact with you will increasingly be mediated by AI. No corner of the industry will be left untouched.

5 - Humans will specialise in orchestration

As automation takes over routine tasks, human roles will evolve into higher-value orchestration — blending expertise, adaptability, and local knowledge to elevate each experience. They will continue to provide the human connection that makes travel feel personal and memorable, building rapport with travellers and fostering moments of genuine warmth.

Some will work on the ground as tour directors, adapting in the moment, anticipating needs, and ensuring the day flows seamlessly. Others will work behind the scenes as remote experience orchestrators, sourcing local inputs, managing timing, and integrating live data into the AI's decision-making. In destinations where the function is owned locally, orchestrators will also balance visitor flows, protect community wellbeing, and ensure the AI delivers the right experience at the right moment. These orchestration roles will be fewer but more specialised — and as a result, more respected, more sought-after, and better paid.

In an age where personalisation is standard, genuine human connection will be the new luxury.

6 - AI concierge networks will connect the journey

A new layer of AI concierge networks will link hotels, transport providers, dining, and attractions into a single real-time system. The hotel will often be the hub, coordinating with flights, local transport, and activity providers to anticipate and resolve changes before they disrupt the trip. If a flight is delayed, check-in is adjusted, dinner is rescheduled, and an evening option is lined up — all automatically. By connecting multiple providers' systems, these networks will make even the most complex itineraries feel effortless, freeing travellers to focus entirely on the experience.

7 - AI tour guides will take many forms

Future guides may be year-round AI partners — life companions who support you at home and in daily life, and who naturally step into the role of AI tour guide when you travel — or AI versions of influencers whose voice and style set the tone for an experience. They will exist in many hardware forms — from wearables to in-vehicle displays, and even humanoid robots that greet you at attractions or even walk beside you in the city.

But whatever the form, they will be character-led AIs using conversational interfaces. History will speak again, with figures like Jane Austen leading walks through Georgian streets or Lord Nelson narrating a harbour tour. Whether personal, contemporary, or historical, these AI guides will make journeys immersive, character-driven, and memorable.

8 - Feedback will be live

The traditional model of ratings and reviews — left after the experience is over — will become obsolete. Instead, feedback will be captured in real time, during the experience itself. Guests' AIs will share instant reactions — from prompts, wearables, or passive signals — with the provider's AI, which will use that input to make immediate adjustments. Over time, these AI-to-AI feedback loops will replace public review systems, as every journey is uniquely designed and adapted in the moment — with no fixed product for future travellers to rate.

9 - Destinations will shift from marketing to management

Today, destinations focus on attracting visitors; in the future, they'll actively manage the quality of every visitor's experience in real time. Their role will be to source and supply live data — from crowding levels to event changes to local sentiment — enabling the AI to make the right decisions for both visitors and residents. Success will be measured not just in arrivals, but in the overall quality and balance of the experiences delivered.

10 - Sustainability will be built in

Environmental responsibility and community wellbeing will no longer rely on traveller choices or destination policies alone — they'll be embedded in the way AI designs and manages experiences. Visitor flows will be balanced in real time, directing people to under-visited areas, staggering arrival times, and minimising resource use. Overtourism will be actively prevented, not just managed, with the system making decisions that protect both the place and the experience.

11 - Leisure and tourism will merge

The boundary between leisure at home and tourism away will dissolve. Travel will no longer be seen as a rare, separate event, but as an extension of the leisure activities people enjoy year-round. The same AI systems that curate weekends in your own city will design experiences when you visit somewhere new — using the same profile, preferences, and live inputs. For providers, this means serving consumers not just for two weeks a year, but for all fifty-two.

12 - The economics of sightseeing will change

The marginal cost of delivering many travel experiences — beyond physical inputs like vehicles, food, or venue costs — will drop to near zero. As AI takes over design, coordination, and delivery, the consumer price for much of the experience will fall sharply, in some cases to nothing. This will make design-led experiences radically more price-competitive than the traditional, fixed-itinerary model. Revenue will shift to dynamic, microtransactions, with visitors paying only for the parts they actually use. Subscription models, experience credits, and tokenised access could let travellers unlock moments on demand, while local creators are paid instantly and fairly. The line between buying a tour and buying time, access, or interaction will blur — creating entirely new ways for value to flow between travellers, providers, and destinations.

13 - Local entrepreneurs will thrive

Even without traditional tours, local expertise will remain essential. Independent guides, artisans, and small businesses will create unique activities, access, and moments — but these won't be bundled within fixed tour itineraries.

Instead, AI will source and weave their offerings into each traveller's evolving experience, operating them seamlessly in the background. The result: more opportunities for locals to share their skills and stories, without the overhead of running a tour operation.

14 - The market will consolidate unevenly

As AI–traveller collaboration becomes the norm, the vast VC-backed marketplaces and booking funnels of the last two decades will be redundant. Consolidation will follow: in many destinations only a handful of top suppliers will be needed to support the full variety of experiences that AI and the traveller design together — from museums and meals to guides, vehicles, and hidden local moments.

Some fixed-itinerary products will persist — for example, school groups, heavily regulated sites, or journeys where the group experience itself is the point. But these will be exceptions. For most of the industry, value will flow to adaptive, design-led experiences, while operators, reztech, and OTAs tied to the fixed model will be left fighting over a shrinking share of demand.

15 - Travel will extend beyond place

The definition of "being there" will expand. AI, immersive tech, and digital twins will allow travellers to preview, participate in, or even fully experience destinations without physically going — or to blend the physical and virtual. You might join a friend on their hike via a holographic companion, explore an ancient site reconstructed digitally while standing in its ruins, or attend a local festival from thousands of miles away. For some, these hybrid experiences will complement physical travel; for others, they may replace it altogether.

Conclusion: The unknown unknowns

Even with the changes we can predict, the biggest shifts may come from the things we can't yet imagine. Advances in AI, new technologies, or cultural shifts could change not just how people travel, but why they travel — reshaping the very idea of what it means to explore the world.

The changes outlined here are already enough to transform the industry; the unknowns could take it even further, accelerating the shift to adaptive experiences and rewriting the rules faster than the market expects.

Appendix

The Touring Test

> *"An AI tour guide can be considered equivalent to a human tour guide if customers achieve a comparable level of satisfaction, engagement, learning, personalisation, responsiveness, emotional connection, and storytelling before, during and after the tour"*

Satisfaction: The overall happiness and contentment customers feel about the tour experience
Engagement: The level of interest and active participation of customers during the tour
Learning: The amount of information and knowledge customers retain from the tour
Personalisation: The extent to which the tour content, preferences, and route are tailored to the individual interests of customers
Responsiveness: The speed and quality with which the guide answers customer questions and addresses their needs
Emotional connection: The ability of the guide to create a sense of empathy and enthusiasm, fostering a personal bond with customers
Storytelling: The effectiveness of the guide in narrating engaging, memorable stories that enhance the tour experience
Error recovery: The ability of the guide to handle and recover from unexpected issues, such as running late, while maintaining a positive experience for customers

Guidelines

Measurement flexibility: At this stage, we don't need to define specific methods for measuring each characteristic. Entities claiming to have passed The Touring Test should use established methods for evaluating each characteristic and must publish their evaluation metrics to ensure transparency and consistency in their assessments
Pass/Fail criteria: An AI tour guide will fail The Touring Test if it falls short compared to human tour guides in even a single characteristic
Transparency: Unlike The Turing Test, it's acceptable for customers to know that the tour guide is AI rather than human during the evaluation

Passing the Touring Test will signal the tipping point when AI tour guides are not just equivalent to humans, but capable of being scaled into the mainstream. Industry change may begin earlier, but the Test marks the threshold where AI-guided sightseeing can truly shift from niche adoption to dominant format.

First published September 2024
https://www.destinationcto.com/2024/09/the-touring-test/

Industry structure

Instead of how it works today…

Affiliate / PPC	*Marketing*
Online travel agent	*Retail, tech platform (consumer facing)*
octo	
Rez tech platform	*Tech platform (supplier facing)*
Tour operator	*Brand, itineraries, operating*
Vehicles / Attractions / Tour guides	*Assets*

We propose this industry structure…

AI agent	*Personalisation, itineraries*
Model Context Protocol	W3C *Decentralised Identifiers (DIDs)*
Brand	*Brand (incumbent travel agents, influencers, hotels, tourist boards, tour operators)*
Digital experience platform	*Retail, operating, tech platform* AUTOURA
octo	
Vehicles / Attractions / Tour guides	*Assets*

Removed *technical complexity*, incorporated *mobility platforms*, improved *experience choice*, enabled *personalisation*

OCTO: https://www.octo.travel

The case against evolution

I've just set out 15 predictions for why AI–designed, adaptive experiences are the future. But if that's the case, why won't the existing sightseeing distribution stack simply evolve to deliver them? The truth is, it will find that shift hard — here's 10 reasons why:

1 - Demand gatekeepers don't have the traveller profiles

OTAs and intermediaries position themselves as the gatekeepers of demand, but the structured traveller profiles they hold are shallow — focused on transactions, not preferences or context. They can't power seamless, adaptive personalisation across multiple suppliers, and they won't share with today's tour operators even the limited data they do have, because they see it as their moat.

Meanwhile, most tour operators don't hold meaningful profiles either: customers are often one-off, visiting a destination once, and rarely booking with the same operator or attraction again. The result is a systemic absence of rich, long-term traveller profiles — exactly the fuel adaptive AI requires.

2 - Platforms don't have the right operational data

Incumbents' data is optimised for selling tickets — not for running adaptive, moment-by-moment experiences. The inputs required for true personalisation are operational: crowd flows, street closures, toilets, food availability, car parking, weather shifts, mobility constraints, even community sentiment. Centralised distributors don't have access to those feeds, and their business models don't incentivise sourcing them. Without that operational layer, their AI can only optimise the booking funnel — not the actual journey.

3 - Reztech can't run adaptive experiences designed by AI

Reservation technology is built to sell and manage fixed products — tours, tickets, time slots — not adaptive experiences that adapt by the minute. It has no concept of pacing a day, adjusting for delays, or responding to live sentiment signals like traveller energy or satisfaction. And even if incumbents wanted to change that, their core platforms weren't built for it. Many still run on decades-old systems designed for batch processing and fixed slots, not live adaptation. Retrofitting those for AI-driven orchestration is like bolting jet engines onto a horse cart — expensive, brittle, and doomed to fail at scale.

4 - Incentives don’t align

Today’s distributors make money by taking a cut of fixed inventory sales — a ticket, a seat, a slot. Adaptive experiences don’t package value that way. They blend free moments, paid access, dynamic upgrades, and personalised micro-interactions into a single journey. The commissionable “unit” isn’t a ticket, it’s the orchestration itself. That requires a different monetisation model — one that rewards designing and operating adaptive experiences, not just selling static products.

5 - Intermediaries don’t want to cannibalise their own suppliers

Moving toward AI-designed, adaptive experiences forces intermediaries to compete with their own suppliers — effectively collapsing the ecosystem they aggregate today. It also reduces the need for such a wide supplier base: instead of dozens of operators, a small number of adaptive orchestrators could deliver the whole range of experiences in a destination. That makes true reinvention impossible without self-destruction.

6 - Experience design isn’t in their DNA

Traditional distributors optimise search, booking funnels, and inventory management. Designing and orchestrating a day — balancing weather, mood, mobility, culture, and context in real time — is an entirely different discipline they aren’t set up for.

7 - Mistaking AI with human replacement

A common misconception is that AI–designed, adaptive experiences mean stripping out human connection — replacing guides, hosts, or service with machines. In reality, adaptive experiences aren’t about removing people but about empowering them, weaving them into the journey at the right moments, and enabling more authentic, human connection where it matters.

By framing it as “AI versus humans,” incumbents misjudge the opportunity and slow down experimentation.

8 - Innovation muscle has atrophied

Most large distributors are no longer founder-led. With scale has come bureaucracy, process, and a focus on quarterly performance. Their innovation muscle hasn't been exercised in years, leaving them poorly equipped to reinvent themselves around AI-designed, adaptive experiences.

9 - Sector leaders are locked into their own story

The major sightseeing online travel agents and distributors are reaching the end of their "*funding* + *scale up*" narratives. They can't afford to reboot from zero without undermining their investor story, so they double down on incrementalism instead of rebuilding. This is also why they actively downplay the threat from AI-designed, adaptive experiences: admitting its significance — or for some, even its existence — would expose the limits of their current model and force uncomfortable questions from investors.

10 - Misreading the threat

Because AI-driven personalisation doesn't look like a direct competitor (there's no big "brand" yet), incumbents underestimate the systemic threat. Many dismiss it as a niche feature — or confuse it with self-guided audio tours — rather than recognising it as a new operating model for experiences of every kind, vehicle and non-vehicle alike.

Some distributors are even delisting digital experiences entirely, doubling down on fixed-itinerary products — a move that blinds them further to how fast the market is shifting. By the time it looks competitive in their current frame, the market will have already shifted.

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