

Leading the Travel Transformation

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**Travel in 2028 won't be booked.
It will be built.
We're the ones building it.**

 *We are building the future.*



Market Context

Coforge in the Lead

Winning Business Outcomes

Growth despite oil headwinds - technology & AI enable resilience

\$11.6T

Travel & Tourism GDP
~11% of world economy

\$1.7T

Gross travel bookings
+6% YoY

\$2.1T

International tourism spend
record high

371M

Jobs in travel & tourism
worldwide

THEN — THE OIL SHOCK · US\$34–56B full-year industry loss

CAUSING A RIPPLE ACROSS THE REST OF THE INDUSTRY

Hospitality

GCC/transit markets worst hit; occupancy reduced to 22.8%

Cruise

6 ships stranded; Royal Caribbean & Norwegian cut 2026

Distribution (Online Travel Agencies)

60% of orgs planning to cut travel; servicing & refund costs surging

Technology & AI are driving resilience

COST SHOCK

Airline fuel-margin hit ~55–60% at \$100 barrel; fares +42% intl, +24% US domestic. Spirit's exit reset pricing power.



ACCELERATING Revenue protection | Dynamic pricing | New Distribution Capability / Digital retailing

DEMAND VOLATILITY

Global Revenue per Kilometer +2.1% but Middle east market demand –60.8%; business-travel optimism fell 59% → 41%.



ACCELERATING AI personalization | Agentic AI Bundling

DISRUPTION REALITY

30,000+ flights cancelled; Gulf rerouting; Qatar, Emirates & Etihad cutting 3M+ seats Jun–Oct.



ACCELERATING AI Led Disruption recovery · Re-accommodation · GenAI servicing

From "enhanced experience" to adaptive travel orchestration - the trends we bet on are arriving faster, under pressure.

AI accelerated transformation – **the earthquake**

Three tectonic plates moved this year. Most of our clients felt the tremor — none of them know it was an earthquake.



PLATE 01 · THE BUYER IS CHANGING

Today, your customer is a machine.

15-25% of luxury bookings in 2026 already originate from AI agents, now climbing to 40% by 2027. Agents parse data, not brand heritage or loyalty marketing.



PLATE 02 · THE INVENTORY IS REWIRING

The pipes are being rebuilt for machines.

Marriott, IHG, Sabre and Amadeus are already live with agentic distribution and Offer-Order. Every major inventory holder is wiring for agents by 2027.



PLATE 03 · THE STACK IS COLLAPSING

50-year-old architecture is getting demolished.

Traditional travel and hospitality systems are giving way to agentic, experience-led retail. Fixed fare classes are becoming dynamic, traveler-specific offers — **an agent at the booking moment, not a human.**

That keyboard is going away.

AI accelerated transformation – **the breakdown**

Five key disruptions and changes the agentic shift creates. Each one ends with the same question.

- | | | |
|-----------|--|---|
| 01 | SCENE 01 · DISCOVERY
The search bar disappears. | <i>Who builds the interface that has no interface?</i> |
| 02 | SCENE 02 · TRANSACTION
Your AI negotiates with theirs. | <i>Who builds the negotiation layer between the buying machines?</i> |
| 03 | SCENE 03 · DISRUPTION
The cancellation that never happened. | <i>Who builds the operational backbone that makes silence possible?</i> |
| 04 | SCENE 04 · ITINERARY
The trip becomes a living thing. | <i>Who builds the orchestration that holds the trip together?</i> |
| 05 | SCENE 05 · LOYALTY
Programs aren't joined — they're inferred. | <i>Who builds the brand-to-machine translation layer?</i> |

The same question, five times... **ONE ANSWER**



Market Context


Coforge in the Lead


Winning Business Outcomes


Coforge has been preparing for this moment


~25%
of revenue comes from travel & transportation


60+
Airline customers 


65+
Airport implementations 


20+
PSS (Passenger Service System) implementations 

5000+
Industry-certified engineers 


60+
Hotel & casino operators managed 


20+
Cargo terminals managed 


 Airlines

 Travel Tech

 Logistics & Rail

 Airports

 Hospitality

 Online Travel Agencies

Our industry specific partners



System Integrator for 170+ travel products

Deep expertise on **Commercial and Passenger Service System** migrations

Smart Airline Suite for Passenger Revenue Accounting

Digital Retailing Transformation for Leading Airlines & Travel Companies

End to end **Air cargo terminal handling solution**

Legacy Modernization & Cloud Transformation Partner

Digital Engineering Partner for Leading Industry Enterprises

Agentic AI solutions for the Travel, Transportation & Hospitality business



Coforge is transforming IT services for the Travel Industry

Five strategic shifts in the AI execution journey.

01

The buyer is changing

From the CIO migrating Passenger Service Systems to the **Chief AI Officer** orchestrating agent fleets.

02

The deal shape is changing.

From fixed-price, per-FTE transformation programs to **outcome-based deals**, per revenue/efficacy gained and per disruption resolved.

03

Domain is the moat combined with AI

5,000+ travel experts, **20+** PSS (Passenger Service System) migrations, **50+** OTA (Online Travel Agencies) integrations, **60+** hotels.

04

A new offer portfolio

Four doorways: agentic retailing (airlines), AI-readable inventory (hospitality), disruption-proof ops (OTA / TMC), conversational loyalty (cruise & rail).

05

The window is 18 months

Whoever owns the agentic-travel reference architecture by 2027 owns the decade

*The answer is **COFORGE** - now it's a playbook. We have Travel in our DNA , we take the lead.*



Market Context

Coforge in the Lead

Winning Business Outcomes

Delivering impact with **AI-powered** solutions

↓ 60%

Reduction in customer support tickets through AI-driven customer experience automation

90%

Accuracy in **prediction** and validation of **crew schedule assignments and reserve levels**

↓ 60%

Reduction in noise from disruption alerts using intelligent, relevance-based AI filtering

70%

Faster fare quotation enabled by AI-based quote & booking automation

↓ 70%

Reduction in back-office processing time through AI-powered contract insights and automation

Travel Technology Company

US Based Airline

Airport Technology Company

Global Airline Cargo Operator

Corporate Travel Company

Orchestrated **Agentic Journeys** delivering measurable business outcomes

Coforge
AER NOVA

Powered by **Forge-X**

Modern Airline Retailing

CX & REVENUE ENHANCEMENT

De-risks and fast-tracks the airline's move to Offer/Order with AI-driven automation and reusable assets, templates and playbooks.

OUTCOME

30–50% acceleration in MAR Transformation

European Airline

Coforge
TravelCore.AI

Powered by **Forge-X**

Legacy Modernization

AGILITY & FLEXIBILITY

End-to-end transformation of commercial, operational and enterprise estates — cloud migration, API enablement and composable, AI-ready architecture.

OUTCOME

50%+ faster go-live · lower platform TCO

Travel Technology Company

 **VoyagerAI**

CX & Personalization

LOYALTY & BRAND PROTECTION

Agentic AI woven across the traveler journey — search, book, disrupt, loyalty and service — personalizing every touchpoint, autonomously.

OUTCOME

30–45% lift in CSAT & loyalty conversion

Middle Eastern Airline

Coforge
FlightFlex

Disruption Recovery

OPERATIONAL EFFICIENCY

AI decision-scoring engine that ranks recovery scenarios across aircraft and crew, rebooks air and non-air, and supports the traveler throughout.

OUTCOME

2.5× faster rebooking & recovery

US Based Airline

Four assets, four service pillars, one story — domain-built AI that delivers measurable outcomes.

Key Messages

- 1 We are **industry leaders**
- 2 Travel is being rebuilt around **agentic architecture**, we are the one building it
- 3 With **Agentic AI at scale**, we are powering a step-change in the traveler journey: 50%+ faster go-lives and 2.5× faster recovery



Coforge
Investor Day
2026

Let's engage!

