

• INSIGHT SERIES •

Perspectives on Travel, Tourism & Transformation

Beyond Booking

Building the Connected Travel Ecosystem

*“The traveller never experiences the travel industry in parts.
The traveller experiences only one journey.”*



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Author

Rajni Hasija

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RRHasija
ASSOCIATES LLP

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Introduction

Every journey leaves behind memories. Travellers remember the destinations they visit, the people they meet, the cultures they experience and the stories they carry home. Rarely, however, do they think about the countless services working together behind the scenes to make those memories possible. Transport, accommodation, local mobility, attractions, hospitality, technology and many other support services may operate independently, but for the traveller they are experienced as one seamless journey.

The importance of getting this journey right extends far beyond creating memorable holidays. According to the **World Travel & Tourism Council (WTTC)**, Travel & Tourism is expected to contribute approximately **US\$11.7 trillion** to the global economy in 2025, accounting for nearly **10% of global GDP** while supporting around **371 million jobs** worldwide. The **World Bank** presents a similar assessment, recognising tourism as one of the world's largest contributors to economic growth, employment generation and regional development. Although the figures differ slightly because of reporting periods and methodology, both organisations reinforce the same conclusion: Travel & Tourism is one of the world's most important economic sectors, and improving the quality of travel is no longer merely a commercial objective but an economic necessity.^{[1][2]}

As the sector has grown, technology has transformed almost every aspect of travel. Online booking platforms, mobile applications, Artificial Intelligence, digital payments and API-driven systems have made searching, planning and booking easier than ever before. At the same time, traveller behaviour has evolved rapidly. The **Google-Kantar India Travel Trends Study (2025)** reports that travellers interact with an average of **seven different touchpoints** before making a booking. The study also notes that 85% of travellers prefer to book their trips online, highlighting the extent to which digital channels now influence travel decisions. Deloitte similarly observes that the travel lifecycle is increasingly digital—from inspiration and booking to in-destination experiences and post-travel engagement.^{[3][4]}

Technology has undoubtedly made individual travel services more efficient, more accessible and increasingly personalised.

The travel industry is not unfamiliar with creating seamless journeys. For decades, curated travel products such as escorted tours, luxury trains, cruise holidays and professionally managed travel packages have demonstrated that when transport, accommodation, sightseeing, dining, local mobility and support services are orchestrated under a single coordinating framework, travellers remember the experience—not the complexity behind it.

Independent travel, however, presents a different reality. While digital platforms have made travel planning more convenient than ever before, the responsibility for bringing together multiple services into one coherent journey continues to rest largely with the traveller. Flights may be booked on

one platform, accommodation on another, local transport through a third and destination experiences through several others. The traveller often becomes the coordinator of a journey assembled from multiple service providers, each operating efficiently within its own domain but rarely as part of a single integrated experience.

This distinction changes the way we should look at the future of travel. The question is no longer whether technology can make individual services better. It already has. The more relevant question is whether technology, supported by effective coordination, can make the entire journey better.

If travellers experience only one journey, why does the industry still so often deliver it through multiple disconnected services?

Section 1. From Service Optimisation to Journey Orchestration

The evolution of the travel industry has largely been driven by specialisation. Airlines focused on improving connectivity, safety and operational efficiency. Hotels strengthened hospitality standards and guest experiences. Mobility providers improved accessibility, while digital platforms simplified search, comparison, booking and payments. Each part of the travel ecosystem has evolved significantly and created substantial value for travellers.

The growth of online travel platforms, digital adoption and technology-led distribution demonstrates the scale of this transformation. These developments will be discussed separately while examining the role of technology in reshaping travel. However, beyond the growth of individual services lies a larger question: how effectively do these services come together to create the traveller's overall experience?

A journey is rarely evaluated through a single interaction. A comfortable flight, a well-managed hotel stay, a smooth payment experience or efficient local transport each contributes positively. However, the traveller ultimately remembers the complete journey. A gap at any stage—arrival assistance, local mobility, destination information, coordination between services or disruption management—can influence the perception of the entire travel experience.

This distinction between individual service performance and overall experience has been studied extensively in customer experience research. In its work on customer journeys, **McKinsey & Company observed that a company's performance on journeys is 35 percent more predictive of customer satisfaction and 32 percent more predictive of customer churn than performance on individual touchpoints.**^[5]

While McKinsey's research examines customer behaviour across industries, its relevance becomes particularly important in travel. Unlike many other sectors, a travel experience is rarely delivered by a single organisation. It depends on the coordinated performance of airlines, accommodation

providers, mobility partners, destination services, technology platforms and several other stakeholders. A traveller may interact with each service separately, but the final judgement is based on how the complete journey comes together.

The missing layer, therefore, is not the availability of good services. The industry already has strong service providers and advanced digital capabilities. The next opportunity lies in ensuring that individual excellence translates into a coordinated and seamless traveller experience.

This need for coordination is also recognised in global tourism development frameworks. UN Tourism, in its approach to sustainable tourism development, emphasises the informed participation of relevant stakeholders and the importance of broad participation and consensus-building. Similarly, the World Economic Forum's Travel & Tourism Development framework evaluates destinations through multiple interconnected dimensions, including infrastructure, enabling environment, services, technology readiness and sustainability.^{67[6]}

These global perspectives examine tourism from the viewpoint of destinations and industry development. When applied to the traveller's perspective, the same principle leads to an important conclusion: what happens as coordination between stakeholders behind the scenes is ultimately experienced by the traveller as simplicity, reliability and confidence.

The next stage of travel transformation, therefore, may not be defined only by better individual services. It may be defined by the ability to bring those services together through effective journey orchestration.

Technology has already transformed how travellers discover, compare and book travel services. The next question is:

Can technology evolve beyond being a transaction enabler and become the foundation for a truly connected travel ecosystem?

Section 2: From Digital Travel to Connected Travel

Section 1 established that travellers experience their journey as one continuous experience, irrespective of the number of organisations involved in delivering it. The next question, therefore, is not whether technology has transformed travel—it undoubtedly has—but how this transformation is reshaping the travel ecosystem itself.

Travel has always been an ecosystem. Airlines, railways, hotels, tour operators, destination management companies, local transport providers, guides, attractions and hospitality professionals have long worked together, each contributing a distinct part of the traveller's experience. Over the years, digital platforms, artificial intelligence, mobile applications, real-time information systems and digital payment technologies have added a powerful new dimension to this ecosystem. Rather than replacing its traditional participants, technology is enabling them to become more connected, more

informed and increasingly responsive to travellers' evolving needs.



Kerala Backwaters — where mobility, hospitality, local communities and destination experiences come together as one journey.

This evolution is changing the way value is created in the travel industry. Earlier, organisations focused primarily on strengthening their individual services. Increasingly, however, competitive advantage will depend on how effectively these services interact with one another. Information must flow seamlessly, decisions must be supported by real-time intelligence, and travellers increasingly expect every stage of their journey to be personalised, transparent and well-coordinated.

Technology is making this possible by creating a more intelligent travel ecosystem. Artificial intelligence, predictive analytics, connected mobility, digital platforms and real-time information are enabling service providers to anticipate traveller needs, respond faster to disruptions and deliver more informed and personalised experiences. The objective is no longer limited to improving individual services; it is to make the entire ecosystem more responsive and better connected.

Yet, even as technology continues to redefine travel, the essence of hospitality remains unchanged. Hospitality is, and will always remain, a people-centric industry. Technology can simplify processes, automate routine tasks and

support better decision-making, but trust, empathy, reassurance and accountability continue to be delivered by people. It is this human connection that transforms an efficient journey into a memorable travel experience.

The future of travel, therefore, does not lie in technology alone, nor does it lie in traditional service delivery alone. It lies in combining the strengths of both. As the travel ecosystem becomes increasingly connected and intelligent, technology will continue to enhance efficiency, while people will continue to provide the trust, responsibility and personalised service that remain at the heart of hospitality.

2.1 From Individual Excellence to Intelligent Collaboration (*Evidence-integrated draft*)

For decades, the travel industry has built its reputation through excellence in individual services. Airlines have continuously enhanced connectivity and operational reliability. Hotels have refined guest experiences through superior hospitality and service standards. Tour operators have created carefully curated itineraries, while destination management companies, local transport providers and attractions have strengthened their own areas of expertise. Each stakeholder has contributed significantly towards improving the quality of travel within its own sphere of responsibility.

This pursuit of individual excellence remains as relevant today as it has always been. At the same time, organised tourism has long demonstrated that a successful journey depends not only on the quality of individual services but also on effective coordination among multiple stakeholders. Rail holidays, escorted tours, cruises, pilgrimage circuits and professionally managed travel programmes have, for decades, relied upon close collaboration between transport providers, hotels, local transport operators, guides and destination partners to deliver a seamless travel experience.

Operational coordination has always been an integral part of tourism management. Delays in transport may require hotel check-in schedules to be revised. Adverse weather conditions may necessitate changes to sightseeing programmes. Local disruptions may call for alternative transport arrangements or modifications to the itinerary. Such adjustments are neither exceptional nor new; they have always been part of delivering a successful travel experience. What travellers ultimately value is not the complexity of these operational decisions, but the continuity of their journey despite changing circumstances.

The Organisation for Economic Co-operation and Development (OECD), in its publication *OECD Tourism Trends and Policies 2026*, observes that digitalisation, artificial intelligence and data-driven approaches are reshaping tourism by improving operational efficiency, enabling more personalised services, strengthening real-time visitor management and enhancing connectivity across the tourism value chain. The report also

highlights the growing importance of coordinated governance and integrated digital tools in improving tourism management. ^[8]

These observations reinforce an important shift taking place across the travel industry. Technology is not reinventing collaboration; collaboration has always been central to organised tourism. What technology is doing is strengthening the industry's ability to collaborate more intelligently. By enabling faster information exchange, supporting better operational decisions and improving responsiveness across multiple stakeholders, digital technologies are enhancing practices that have long been fundamental to successful travel management. The opportunity before the industry, therefore, is not merely to digitalise individual services, but to make the entire travel ecosystem more connected, more intelligent and more responsive.

2.2 The Intelligent Travel Ecosystem

Digital transformation has significantly improved the way travel services are discovered, booked and managed. Online booking platforms, digital payments, mobile applications and automated processes have transformed the traveller's experience by making travel planning more accessible, transparent and convenient. These technological advancements have enhanced operational efficiency across the travel industry and laid the foundation for a more digitally connected travel environment.

The Organisation for Economic Co-operation and Development (OECD), in its publication *OECD Tourism Trends and Policies 2026*, observes that digital technologies, artificial intelligence and data-driven approaches are reshaping tourism by improving operational efficiency, enabling more personalised visitor experiences, supporting real-time management and strengthening connectivity across the tourism value chain. The report further highlights that digital technologies are increasingly supporting better decision-making rather than merely automating routine processes. ^[8]

These developments signal an important shift in the evolution of the travel industry. The objective is no longer confined to improving the efficiency of individual services; it is to enhance the intelligence of the travel ecosystem itself. **The true value of technology lies not in generating information, but in enabling stakeholders to convert information into timely, informed and coordinated action.** Information becomes intelligence only when it supports better decisions, improves coordination and enables faster, more effective responses to changing circumstances.

The intelligence of the ecosystem is reflected in its ability to convert information into timely and informed action. Real-time weather information may require operators to revise the sequence or timing of scheduled activities, arrange suitable alternatives where necessary, or issue timely advisories to travellers without compromising the overall itinerary. Changes in transport schedules can trigger adjustments to hotel check-in timings, local transport

arrangements or onward connections. Destination intelligence can provide travellers with up-to-date information on visitor density, local events, weather conditions and other factors that may influence their travel experience. Connected mobility platforms can facilitate better coordination across different modes of transport, while real-time information enables operators to take informed decisions quickly and minimise inconvenience to travellers. In each of these situations, technology does not replace operational judgement; it enhances the ability of stakeholders to respond promptly, intelligently and collaboratively.

This evolution has important implications for the future of travel. Competitive advantage will increasingly depend not only on the quality of individual services or the efficiency of digital platforms, but also on the ability of the wider ecosystem to anticipate change, share intelligence and collectively respond to the traveller's evolving needs. **The competitive advantage of the future will not lie merely in access to information, but in the ability of the travel ecosystem to transform information into timely, coordinated and traveller-centric decisions.** Intelligence, therefore, becomes the bridge between collaboration and the Connected Travel Ecosystem.

2.3 Defining the Connected Travel Ecosystem

The travel industry is entering a new phase of evolution. Collaboration among stakeholders has always been fundamental to organised tourism, while digital transformation has significantly enhanced the industry's ability to exchange information and improve operational decision-making. The next logical step is to bring these capabilities together into a connected ecosystem that functions around the traveller rather than around individual service providers.

The Asian Development Bank (ADB), in its publication *Promoting Smart Tourism in Asia and the Pacific through Digital Cooperation (2023)*, emphasises that the future of tourism depends on digital cooperation, ecosystem-wide collaboration and stronger integration among tourism stakeholders. The report highlights that greater value is created when technology enables information sharing, coordinated decision-making and collaboration across the wider tourism ecosystem rather than within isolated organisations. ^[9]

While the ADB presents this evolution from the perspective of destinations and regional tourism development, this paper extends the same principle to the traveller's journey. A truly connected travel ecosystem is one in which every stakeholder contributes to a single travel experience rather than delivering isolated services independently.

Definition: Connected Travel Ecosystem

A Connected Travel Ecosystem is the natural evolution of the travel industry, where people, technology, digital platforms

and travel service providers work intelligently together around the traveller, transforming multiple independent services into one seamless, informed and accountable travel experience.

This definition recognises that the future of travel is not about replacing existing stakeholders or redefining their individual roles. It is about enabling them to work together more intelligently, so that the traveller benefits from a journey that is coordinated, responsive and accountable from beginning to end.

The Connected Travel Ecosystem, therefore, is not a new segment of the travel industry. It is the next stage in its evolution. The challenge before the industry is no longer whether such an ecosystem is possible, but how effectively organisations can collaborate to make it a practical reality.

Section 3 — Design Principles for a Connected Travel Ecosystem

Defining a Connected Travel Ecosystem is only the starting point. The more important question is how the concept can be translated into a practical travel experience. This requires moving beyond individual technologies or services and looking at the principles around which the ecosystem itself should be designed.

There can be no single model for such an ecosystem. Travel markets differ, business models vary and the roles of digital platforms, service providers and public institutions will continue to evolve. The objective, therefore, is not to prescribe one operating structure, but to identify a set of design principles that can guide different organisations in building more connected travel experiences.

This paper proposes four design principles that together form the Connected Travel Ecosystem Framework. Each addresses a different dimension of designing and delivering a connected journey, while collectively providing a practical direction for moving the concept from intent to implementation.

Principle 1 — Design Beyond the Transaction, Around the Traveller

Transactions remain fundamental to the travel business. An enquiry reveals intent; a booking converts that intent into a commercial relationship. The opportunity lies in what happens thereafter.

A booking should not be treated merely as the completion of a transaction. It also provides context about the traveller—the journey being undertaken, the destination, timing and, increasingly, the needs that may arise around it. The value of a Connected Travel Ecosystem lies in using this context intelligently

to make the traveller's next step easier, rather than requiring the traveller to repeatedly start afresh with every service provider.

This does not require one organisation to provide or own every service. It requires the ecosystem to be designed around the traveller's evolving needs, with each interaction contributing intelligently to the continuity of the journey.

The transaction, therefore, is not the destination of the relationship. It is the entry point into the traveller's journey.

Amadeus, in its *Global Mobility Trends: Decoded — Traveler Insights 2026*, based on insights from 3,000 travellers worldwide, notes that understanding how travellers plan their journeys before departure is essential to anticipating their needs and delivering more seamless mobility experiences.^[10]

This reinforces the shift from viewing each interaction only as a transaction towards using it as context for the wider journey. Designing beyond the transaction therefore requires moving from asking “**What else can we sell?**” to asking “**What might the traveller need next?**” The first extends the transaction; the second extends the relationship.

The objective is not to surround the traveller with more choices, but to reduce the effort required to navigate them. The better the ecosystem understands the context of the journey, the more effectively it can support the traveller at the right moment.

Principle 2 — Connect the Digital and Physical Worlds

A Connected Travel Ecosystem cannot be designed only from information available in the digital world. Travel is ultimately experienced on the ground, and the usefulness of technology depends upon how accurately the digital experience reflects that physical reality.

Ground validation should therefore precede the design of the digital architecture for a destination or tour product. A proper recce helps validate locations, distances, accessibility, local mobility, attractions, facilities and other practical requirements from the traveller's perspective. This becomes the foundation on which reliable destination intelligence can be built and subsequently kept relevant through regular and real-time updates.

The **European Commission's Interoperable Europe initiative, in its 2025 guidance on Local Digital Twins**, provides a useful parallel. It describes digital twins as virtual representations of physical assets, systems and processes, supported by reliable data and capable of being updated as conditions in the physical environment change. While developed primarily for cities rather than tourism, the principle is relevant to destination design: a

meaningful digital representation must remain anchored to the physical environment it seeks to represent.^[11]

Technology can then do what it does best—organise this intelligence, make it accessible, keep the traveller informed and facilitate decisions during the journey. But if the reality on the ground is significantly different from what the digital platform understands or communicates, the purpose of technology itself is defeated.

Theoretical connectivity may create a digital ecosystem; ground-validated intelligence is what makes it a travel ecosystem.

Principle 3 — Build Intelligence Across the Journey

Artificial Intelligence can add significant value to a Connected Travel Ecosystem, but its purpose should go beyond generating itineraries and recommendations. Its real strength lies in combining traveller context with reliable and real-time information to support better decisions throughout the journey.

A practical example can already be seen in the **2025 partnership between Google Cloud and MakeMyTrip**. The companies are combining AI with grounded information from Google Maps, Places, Search and other sources, including local weather, activities and commute options, to develop more context-aware and personalised travel planning. The example illustrates how AI becomes more useful when it works with reliable contextual information rather than operating independently of the traveller's circumstances.^[12]

Before travel, AI can help identify relevant choices based on traveller preferences. During the journey, it can help assess disruptions, anticipate their impact and suggest practical alternatives. For operators, the same intelligence can support faster and more informed responses.

The value of AI should therefore be measured not by how much it automates, but by how intelligently it assists the journey.

Principle 4 — Design for Accountability, Not Just Automation

As travel becomes increasingly automated, responsibility should not become invisible. Technology can inform, recommend and facilitate, but when a journey is disrupted, the traveller needs more than another notification or automated response. There must be a clear path to assistance, ownership and resolution.

Evidence from **Amadeus' 2025 Transforming Travel research**, based on 9,500 travellers across seven markets, reinforces the importance of service recovery. In its analysis of travel disruption, 75% of travellers said the true quality of a provider becomes apparent in such situations, while 74% indicated that they would be likely to book again when the provider handled

the disruption well through proactive solutions. The findings suggest that disruption management is not peripheral to the traveller experience; it can directly influence trust and future loyalty.^[13]

Service recovery should therefore be designed into the Connected Travel Ecosystem from the beginning, rather than treated as an exception after something goes wrong. The traveller should not have to identify which system, platform or service provider is responsible, nor be repeatedly redirected while trying to resolve a problem. Connectivity has little meaning if responsibility remains fragmented.

A truly connected journey is not one in which nothing goes wrong; it is one in which the traveller is not left alone when something does.

Section 4 — Creating Value Through Connectivity

The four design principles outlined above provide the architecture for a more connected travel experience. Their relevance, however, will ultimately depend on the value they create. Connectivity is not an end in itself; it becomes meaningful when it makes the journey easier for the traveller, creates stronger opportunities for travel businesses, and extends the benefits of tourism more effectively across destinations and the wider travel economy.

The value of a Connected Travel Ecosystem can therefore be viewed through three interconnected dimensions: **the traveller, travel businesses, and destinations and the wider travel economy.**

4.1 Value for the Traveller

For the traveller, the most immediate value of connectivity is **less effort, through greater ease and continuity across the journey.**

Today, much of the responsibility for connecting different parts of a journey still rests with the traveller—searching across platforms, coordinating different bookings, checking whether information remains current and finding alternatives when circumstances change. Individual services may work efficiently, yet the traveller is often left to connect them.

This need for greater continuity is reflected in the **IATA Global Passenger Survey 2025**, based on more than 10,000 responses from over 200 countries. IATA's subsequent 2026 analysis observes that passengers are looking beyond individual digital touchpoints towards a more integrated experience across the journey. It also identifies baggage handling, border control and transfers—areas involving multiple stakeholders—as continuing points of friction and opportunities for greater collaboration across the travel ecosystem.^[14]

These findings reinforce an important point: individual services may function efficiently, but value for the traveller increases when the connections between them become easier to navigate.

A Connected Travel Ecosystem can reduce the traveller's effort by making information, services and assistance available in the context of the journey and at the point at which they are needed. The value is not in offering more information or more choices, but in making those choices **relevant, timely and easier to act upon**.

This can also create greater confidence. When information is reliable, the digital and physical journey remain aligned, and assistance is available when required, the traveller can focus more on experiencing the journey rather than continuously coordinating it.

4.2 Value for Travel Businesses

A Connected Travel Ecosystem can create value for the traveller only if it also creates value for the businesses participating in it. Collaboration cannot be sustained merely because it improves the traveller experience; each participant must also see a meaningful commercial or strategic benefit.

The opportunity lies in extending the value of an existing customer relationship. A transaction already provides a travel business with context—where the traveller is going, when the journey is taking place and what service has already been chosen. When this context can connect appropriately with other parts of the ecosystem, businesses can identify relevant opportunities beyond their own immediate transaction, while other service providers gain access to demand at the point at which their services are most relevant.

A **2025 Forrester Consulting study of 424 travel-industry respondents** found that travel leaders expect ancillary sources to account for **36% of total revenue over the following three years**. Significantly, the study indicates that sustainable ancillary growth depends not simply on offering more products, but on using data and insights to make cross-sell and upsell opportunities more relevant while maintaining convenience for the traveller.^[15]

This opportunity, however, needs an important safeguard. **Relevance should not become intrusion, and personalisation should not compromise privacy or traveller choice**. A recommendation made primarily because it generates commission can easily become an imposed choice rather than a useful one. The commercial objective must therefore remain aligned with the traveller's experience, with appropriate and responsible use of customer data.

The opportunity is substantial—better conversion, cross-selling, retention and access to demand—but the objective should not be to maximise every possible transaction. **The real commercial advantage lies in connecting the right service with the right traveller at the right stage of the journey, without compromising trust or choice**.

A connected ecosystem can therefore change the economics of the customer relationship: **from maximising the value of a single transaction to participating responsibly in the value created across a wider journey.**

4.3 Value for Destinations and the Wider Travel Economy

The value of connectivity can extend beyond the traveller and individual travel businesses to the destination itself. Tourism demand is often concentrated around well-known attractions, established commercial areas and services that are already highly visible on digital platforms. Yet a destination may have many smaller experiences, local businesses, cultural assets and communities that remain outside the traveller's immediate field of discovery.

A Connected Travel Ecosystem can help bring these less-visible elements into the journey. When reliable information about local attractions, experiences, mobility, timings and services becomes discoverable and easier to act upon, travellers can explore beyond the most familiar choices. This can help distribute visitor movement and spending more widely across a destination, while creating opportunities for smaller local enterprises to participate in the tourism economy.



Living Root Bridges of Meghalaya — where landscape, local knowledge and community become part of the travel experience

Evidence from the **World Bank's 2025 review of Indonesia's Integrated Tourism Development Project** demonstrates the wider economic potential of this approach. Across six destinations, more than **20,000 businesses expanded their online presence**, while tourism villages received support to

develop income and livelihood opportunities. The programme is also estimated to have contributed to the creation of more than **975,000 job opportunities** and attracted over **US\$870 million in private investment**.^[16]

The value, however, is not simply in directing more tourists to more places. Destinations must also consider capacity, local conditions and the impact of visitor flows. **Overtourism, increasingly visible at popular destinations, including Indian hill stations during peak summer periods, illustrates why simply increasing visitor numbers cannot be the objective.** Connectivity can instead support better distribution of demand—helping travellers discover relevant alternatives while enabling destinations to manage tourism more intelligently.^[17]

A connected ecosystem can thus create value not only by making a journey easier to navigate, but by making the economic opportunity created by that journey more widely accessible across the destination.

Section 5 — From Framework to Reality

The value described in the previous section demonstrates why a Connected Travel Ecosystem is worth pursuing. Translating that value into reality, however, requires more than technology or individual organisational initiatives. Travel remains a multi-stakeholder industry, and connectivity can work only when different systems, commercial interests and institutional responsibilities are able to work together.

Four areas are particularly important in making this possible: **interoperability and data sharing; trust, privacy and responsible use of data; commercial alignment; and governance and institutional collaboration.** Together, they represent some of the practical conditions that will determine whether a Connected Travel Ecosystem can move from concept to implementation.

5.1 Interoperability and Data Sharing

A Connected Travel Ecosystem should simplify the journey for the traveller, not expose the complexity of the systems behind it. The traveller should be able to discover, plan and access relevant services through a sufficiently comprehensive interface, without repeatedly moving across multiple channels to complete different parts of the journey.

Delivering such simplicity at the front end, however, requires considerable connectivity at the back end. Airlines, railways, hotels, mobility providers, attractions, digital platforms and destination systems operate independently, often through different technologies, standards and commercial arrangements. Their relevant services and information must therefore be capable of connecting with the ecosystem.

The aviation sector offers a useful illustration of both the progress and the challenge. **Global Distribution Systems (GDS) have enabled significant connectivity between airlines and travel distribution, while IATA's ONE Order initiative represents a further attempt to simplify the passenger experience through a single integrated customer order.** The ambition is important, but achieving interoperability across different organisations, countries and legacy systems remains complex. ONE Order should therefore be viewed not as evidence that the problem has been solved, but as an example of the industry's continuing effort to make multiple systems work more coherently around the traveller.^[18]

Interoperability does not mean that every participant must open every system or share every piece of data. It means enabling **the right information to move between authorised systems, for a defined purpose and with appropriate safeguards**, so that the traveller experiences continuity without having to navigate the complexity behind it.

The objective is therefore simple: complexity may remain behind the ecosystem, but it should not become the traveller's burden.

5.2 Trust, Privacy and Responsible Use of Data

A Connected Travel Ecosystem will inevitably depend on data—about journeys, preferences, locations and transactions. The more effectively this information is connected, the greater its potential to make services relevant and timely. But greater connectivity also creates greater responsibility.

This responsibility is increasingly being reinforced through regulation. **India's Digital Personal Data Protection Rules, 2025, notified by the Ministry of Electronics and Information Technology in November 2025, have taken the country's data-protection framework further into implementation.** Globally, enforcement has also become increasingly significant. In December 2024, the **Irish Data Protection Commission imposed fines totalling €251 million on Meta following a Facebook data breach**, including findings relating to failures in data protection by design and by default.^{[19][20]}

For a Connected Travel Ecosystem, the implication is clear. Travellers should understand what information is being collected, why it is required and how it will be used. **Consent should be meaningful, data sharing should be proportionate to its purpose, and personalisation should never become surveillance.**

The principle should therefore remain simple: **use enough data to improve the journey, but not more than the journey legitimately requires.**

5.3 Commercial Alignment

A Connected Travel Ecosystem may be designed around the traveller, but it will ultimately be delivered by businesses with different commercial interests.

Airlines, railways, hotels, mobility providers, digital platforms, attractions and local service providers operate with different margins, costs and revenue models. Their willingness to collaborate will therefore depend upon whether participation creates value for them as well.

Commercial alignment does not require every participant to benefit equally. It requires a model in which the **value created through collaboration is recognised and shared in a manner that gives each participant a reason to remain part of the ecosystem**. Revenue sharing, commissions, transaction fees, subscriptions or other partnership structures may all have a place; the appropriate model will depend upon the service and the role being performed.

This principle finds support in a **2024 study published in the *Journal of Business Research* on value co-creation in tourism ecosystems**. Examining collaboration among different tourism actors, the study identifies the **motivation of participating stakeholders to engage** as an important requirement for effective value co-creation. The implication for a Connected Travel Ecosystem is practical: collaboration becomes sustainable when participating organisations can see value in remaining part of it.^[21]

The challenge is to prevent the ecosystem from becoming disproportionately valuable to the participant that controls the customer interface while reducing other service providers merely to fulfilment partners. Sustainable connectivity requires commercial relationships in which contribution, risk and reward remain reasonably aligned.

An ecosystem can create value collectively only when participation also makes commercial sense individually.

5.4 Governance and Institutional Collaboration

A Connected Travel Ecosystem cannot be built through technology and commercial partnerships alone. Many parts of a journey operate within public infrastructure, regulatory frameworks and destination systems. Governments, tourism authorities, transport institutions, local bodies and private-sector participants therefore have different but interconnected roles in enabling the ecosystem to function.

Governance in this context does not mean creating another layer of control. Its purpose is to create an enabling framework—**common standards where required, clarity of roles and responsibilities, mechanisms for collaboration, and an environment in which innovation can take place without compromising public interest or traveller protection**.

This need for collaboration is reinforced by the **World Travel & Tourism Council's 2026 policy brief, *Destination Stewardship: Creating Value for All***. WTTC calls for governments, destinations and the private sector to work together through stronger planning, stakeholder collaboration and evidence-

based decision-making so that tourism creates lasting value for residents, businesses and visitors.^[22]

Institutional collaboration becomes particularly important where no single organisation controls the complete journey. Public institutions may enable infrastructure, standards and access to information; private enterprises may bring technology, innovation and customer-facing services; while destination and local stakeholders provide the physical services through which travel is actually experienced. The strength of the ecosystem will depend on how effectively these capabilities complement one another.

The Connected Travel Ecosystem will therefore not be created by one platform, one institution or one technology. It will emerge when different participants are able to contribute their strengths within a framework of shared purpose, clear responsibility and mutual trust.

THE JOURNEY FROM BOOKING TO A CONNECTED TRAVEL ECOSYSTEM

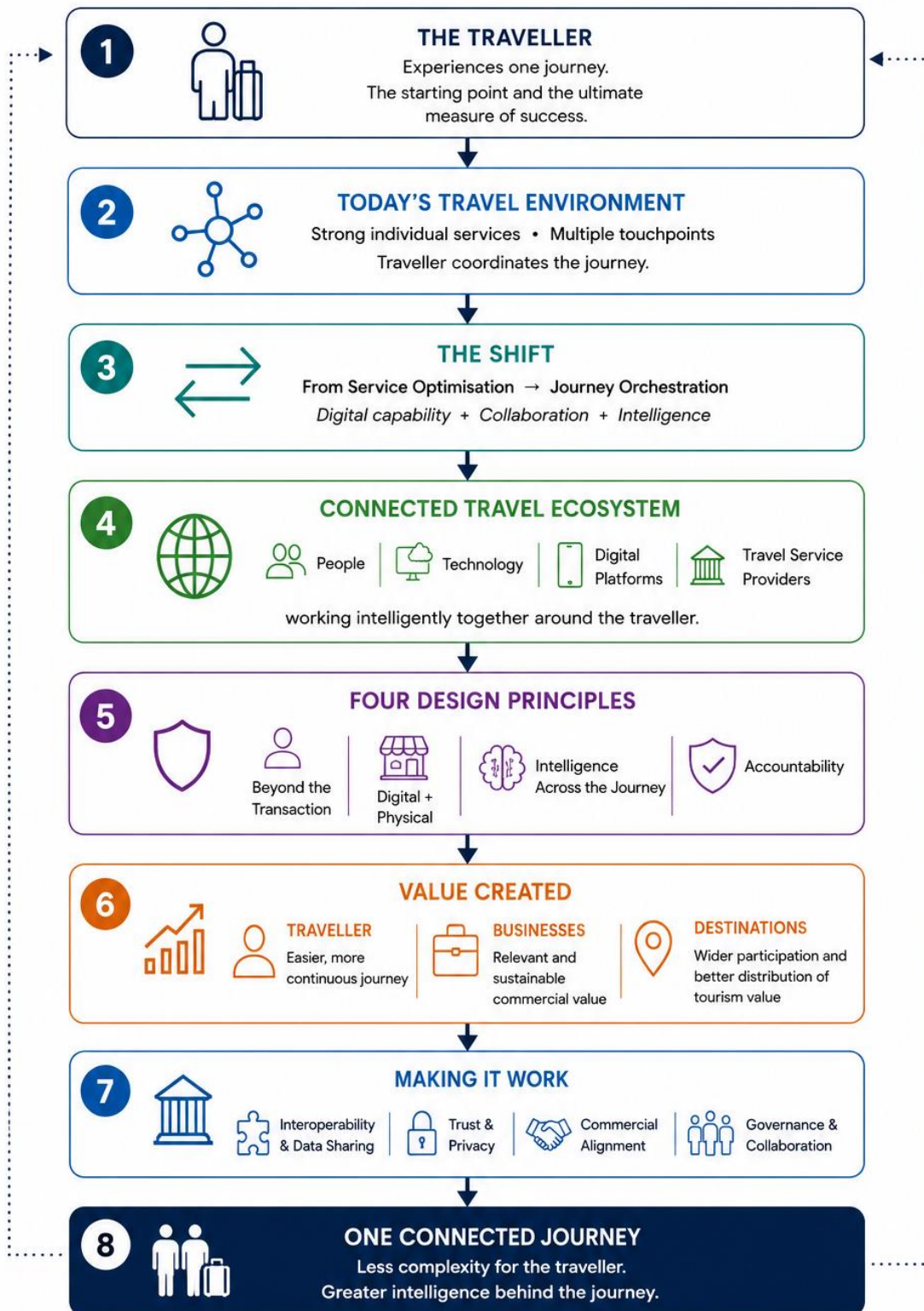


Figure 1. Connected Travel Ecosystem Framework —
From Fragmented Services to One Connected Journey

Conclusion — The Journey Beyond Booking

Travel has always been an ecosystem. What has changed is our ability to connect it.

For years, the industry has successfully transformed individual parts of the journey. Booking became digital, information became real-time, payments became seamless and services became increasingly personalised. Yet the traveller still carries much of the responsibility for bringing these advances together into one journey.

The next transformation must therefore be different. It should not be measured simply by how much more technology the industry deploys, but by how much complexity it can remove from the traveller's experience.

The Connected Travel Ecosystem proposed in this paper is not a call for one organisation to own the journey, nor for one technology to control it. It is a call for the many participants who already make travel possible to become more intelligently connected—while preserving traveller choice, privacy, accountability and the commercial interests that make collaboration sustainable.

There will be challenges. Systems will not connect overnight, commercial interests will not always align, and technology will continue to evolve faster than institutions and regulation. But transformation in travel has never happened in one step. What appears difficult today can become the infrastructure of tomorrow when the industry begins moving in the same direction.

The future of travel will not be defined by how many services we can put online. It will be defined by how intelligently we can bring them together.

Because ultimately, the traveller does not experience an airline, a hotel, a mobility provider, a platform or a destination in isolation.

The traveller experiences a journey. Our responsibility is to make it feel like one.

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