

➤ White Paper on Tourism Intelligence  
Executive Edition | 2026

**Travel distribution in the  
machine-to-machine era.  
How will your customers find you?**



# *A Message from Dida Leadership*

## **The way travel is distributed is changing... quietly, but fundamentally.**

More and more, customers are relying on AI agents to search, compare, and book on their behalf. This shift raises an important question for every travel brand: are your systems ready to be found and chosen in a machine-to-machine world?

This isn't about replacing people. It's about how technology is reshaping the paths between supply and demand, and how brands remain visible as those paths evolve.

Many AI initiatives struggle not because the technology isn't capable, but because the data beneath it is fragmented or locked in legacy systems. That fragmentation creates friction, slower decisions, and missed opportunities. Solving it is not just an IT task; it's a strategic advantage.

This white paper is a practical guide to modern travel distribution. It explores how reducing fragmentation creates better discovery, better conversion, and better outcomes in an AI-assisted ecosystem.

The machine-to-machine era is already taking shape. We hope this paper helps you build for it with confidence.



**Daryl Lee**

Group CEO Dida Holding



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# THE STRATEGIC IMPERATIVE

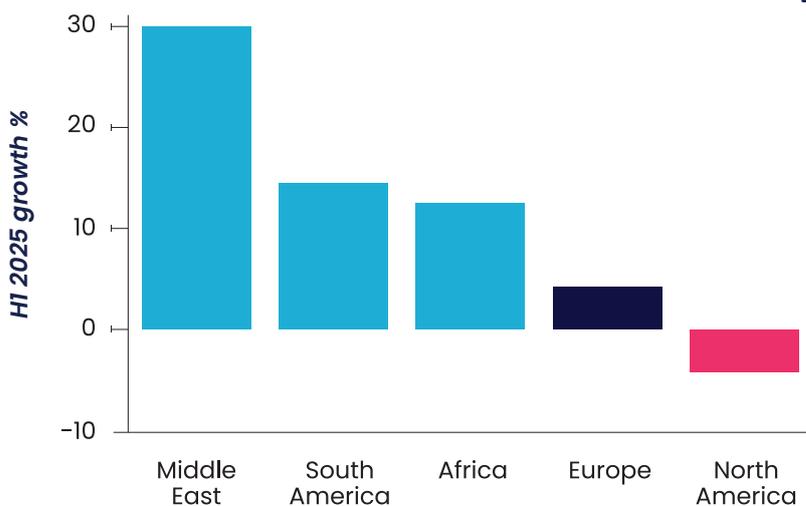
## 1. The New Rules:

# Why Winners Are Designed, Not Inherited

### *From uneven recovery to strategic re-sorting*

The travel market is not shrinking; it is re-sorting. After the pandemic, recovery has become uneven and increasingly policy- and product-driven, creating a new competitive map for destinations and suppliers. In this environment, leadership is less about forecasting the “global outlook,” and more about sensing shifts early, reallocating faster, and converting volatility into advantage.

### *Growth of new hotspots by region*



**One line of context is enough:** growth is slow. The IMF projects global growth of 3.3% for 2025, below the 3.7% historical average. That means fewer “free tailwinds,” more scrutiny on yield, and a narrower tolerance for operational drag.

**The real story is divergence:** winners rise, giants stall. What should concern travel executives is not the average; it is the spread. In H1 2025, new hotspots continued to grow sharply, while traditional leaders plateaued or lost share. Africa’s arrivals grew 12%; South America rose 14%; the Middle East remains 29% above pre-pandemic levels; and in Asia, Japan and Vietnam both registered 21% growth.

Meanwhile, traditional travel giants are struggling. North America saw zero growth as travel to the United States and Canada declined, and the US is projected to lose \$12.5 billion in visitor spending in 2025... driven by a strong dollar, complex visa policies, and an increasingly unwelcoming climate. Europe presents a different warning: demand can be strong and still become a strategic liability when overcrowding degrades the experience and inconsistent policy responses introduce long-term competitiveness risk.

**Why this matters: performance is becoming “designed,” not “inherited.”**

These winners share a visible pattern: decisive investment, clearer positioning, and fewer frictions between intent and arrival. In the Middle East, growth is amplified by large-scale connectivity and destination investment, with Qatar (+141%) and Saudi Arabia (+61%) as headline examples.

The laggards are not losing because demand disappeared; they are losing because friction accumulated. In this cycle, tourism advantage shifts from size to responsiveness. The question is no longer **“how large is your footprint?”** but **“how quickly can you re-route demand, re-price inventory, and re-coordinate partners when the map changes?”** Being agile, accessible, and welcoming is increasingly more decisive than having the largest economy.

**Bridge to the core argument:** This is where the industry’s real constraint reveals itself. When shifts accelerate, fragmentation becomes a compounding tax: disconnected systems slow decisions, hide signals, and prevent coordinated recovery across the journey. The next chapters explain why removing that tax (through trusted data, shared context, and a more open ecosystem) is now the fastest path to resilient growth.

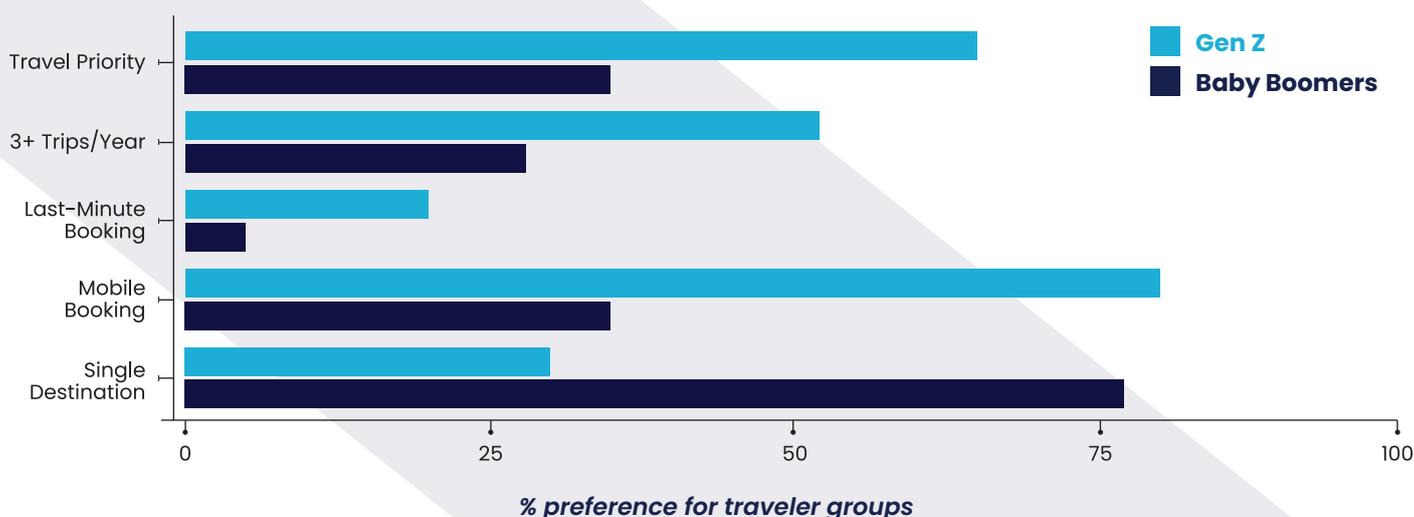
## 2. The New Customer: When AI Agents Become Your Interface

### *Decoding the trust gap that blocks \$4.4 trillion in value*

A new type of traveler has emerged. They value different things, travel for different reasons, and plan trips in entirely new ways. The uncomfortable truth is that much of the tourism industry is not built to serve them. When data is trapped in disconnected systems, the result is predictable: missed revenue, wasted marketing spend, and fragile loyalty at the exact moment customers are moving faster and expecting more.

**Who travels now: a split market, not a single “customer.”** Younger generations now drive demand, and for them, travel is not an occasional luxury... it is a priority allocation of money and time. For 65% of Gen Z, travel is the most important way to spend their money; more than half take at least three leisure trips a year; nearly 20% book within a week of departure; and 80% book via smartphone. Meanwhile, Baby Boomers show the opposite preference set - 77% want a single destination and remain less comfortable with digital journeys.

### *Gen Z vs Baby Boomers: Travel Behavior Comparison*



This is not “segmentation” as a marketing exercise. It is an operational stress test. The same industry stack is expected to capture Gen Z’s last-minute, internationally minded demand while also delivering the simple, reliable packages older travelers crave... and disconnected systems routinely fail both.

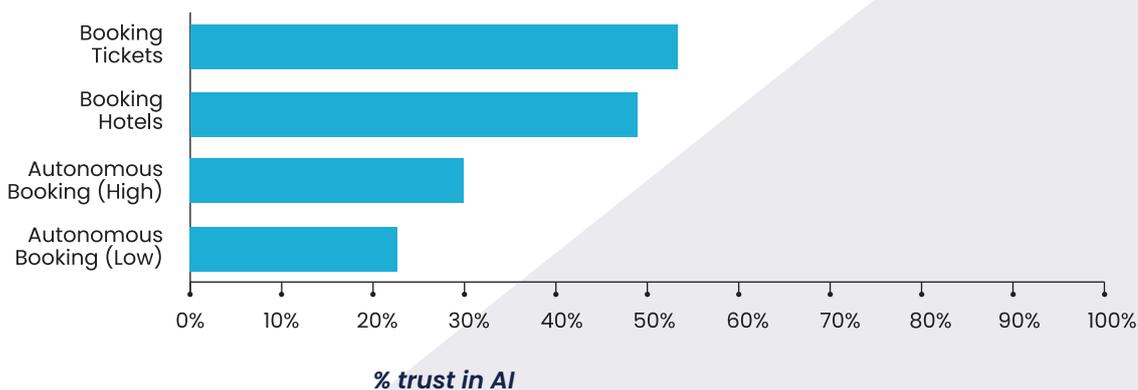
**Why they travel: work, wellness, and purpose are converging.** Demand is also changing shape. Travel motivations are no longer cleanly separated into business, leisure, and health; they are blending. The “workcation” is mainstreaming into a global digital-nomad economy: over 40 million digital nomads worldwide, with US growth up 147% since 2019. Wellness travel has moved from niche to economic force: about \$1 trillion in 2024, projected toward \$3.3 trillion by 2034.

**How they plan: GenAI turns planning into conversation, and trust becomes the bottleneck.** The planning journey is being rewired. GenAI is shifting travel discovery from “search and scroll” to “conversation and decide.” Already, 17% of US travelers consult AI tools for travel ideas, growing 30% year-over-year, and AI-integrated travel sites have seen traffic surge by 3,500%. Most travelers find value in the experience: 78% say GenAI results are helpful for planning and in-destination support.

This changes what wins: not only SEO, but “Generative Engine Optimization” (GEO) – structuring information so AI can interpret it as reliable, current, and bookable.

The constraint is not capability; it is trust. While travelers show meaningful comfort with AI for discrete transactions like tickets (59%) and hotels (54%), only 25–33% are ready to let GenAI handle the entire booking end-to-end. This “trust gap” is the gating factor for an agent-to-agent future. It will not be solved by better copywriting; it requires verified, connected data that both humans and AI agents can rely on.

### AI Trust Levels by Use Case



**How they choose: influence is live, and reputation is operational. Inspiration has moved from campaigns to conversations.** User-generated content is now a primary engine of demand: #TravelTok generates over 74 billion annual views, and one-third of TikTok users book travel after watching a video. Trust has shifted accordingly - 92% of consumers find peer content more credible than brand advertising, and sites featuring UGC see a 29% lift in conversion.

This makes reputation a real-time, monetizable variable, not a static score. A one-point increase in a hotel's Global Review Index correlates with a 1.42% increase in RevPAR; responding to reviews within two hours is associated with an average +6.3 GRI points, implying meaningful upside. In practice, "marketing" becomes inseparable from operations: the product experience is the message, and every service failure is now public, searchable, and algorithmically amplified.

**What this means for leaders: four moves, one dependency.** The new traveler (experience-first, AI-assisted, socially influenced) directly challenges the industry's old, fragmented structure. The response is straightforward: shift from selling isolated products to delivering complete journeys; invest in infrastructure that supports work-and-wellness travel; treat structured, trustworthy data as a core growth asset in the AI era; and run reputation as a real-time discipline, not a brand project.

The dependency is the hard part: no single company can do this alone when information is trapped across disconnected systems. Isolation blocks the collaboration required to build seamless experiences, modern infrastructure, and trusted data... and the penalty is not theoretical; it is hidden cost and lost customers. The winners will be the ones who move first to a shared operating model built on verified, real-time information - because in an AI-mediated market, trust is not a slogan; it is architecture.



## 3. The \$12.9M Tax:

# How Fragmentation Destroys Margin and Speed

### *Three hidden costs leaders can no longer ignore*

The fragmentation tax is the recurring cost every travel business pays because the industry cannot see or act on a complete journey. Data and decisions are trapped in isolated systems across airlines, hotels, intermediaries, and destinations, so teams compensate with manual work, duplicated spend, and avoidable leakage. The result is not just inefficiency. It is a structural penalty on margin and speed.

#### **What this tax looks like in practice.**

Fragmentation compounds in three places that leaders care about: operations, growth spend, and revenue integrity.

**Operational waste: humans become the integration layer.** When core systems don't talk, employees do. This is why lack of integration is repeatedly flagged as a top operational challenge, and why the downstream cost of bad data and process failures is so large.

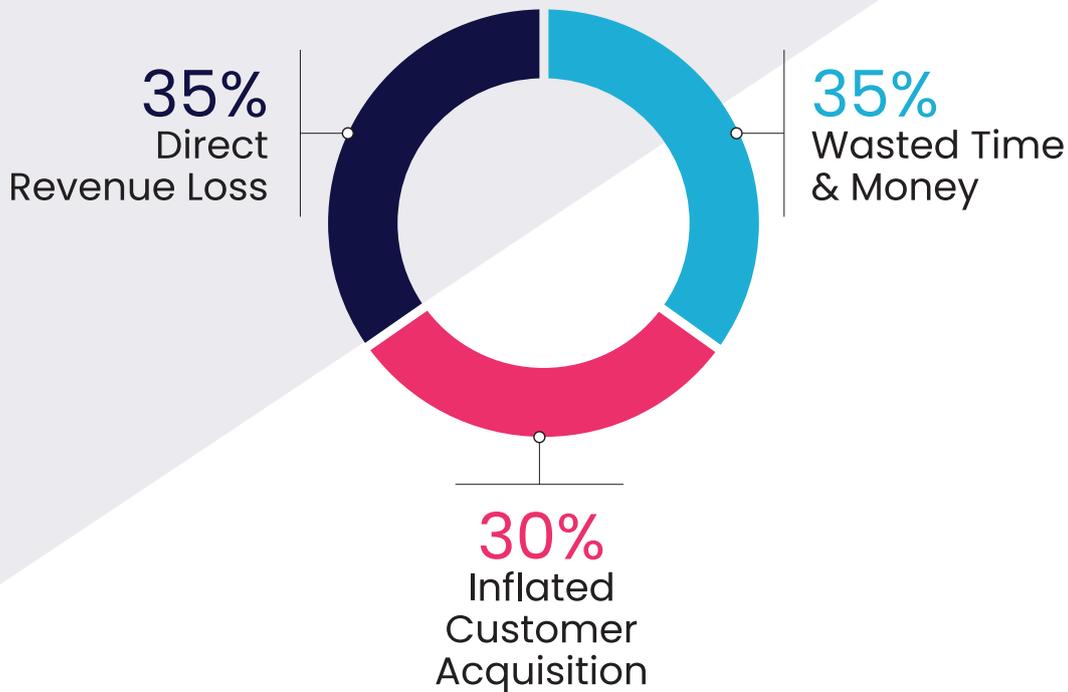
Over 65% of hoteliers cite poor integration as a major issue, and airlines lose an estimated \$203 million every day from booking errors, ticketing mistakes, and billing problems.

**Inflated customer acquisition: paying to “re-buy” your own customers.** Without a unified customer view, targeting becomes noisy and wasteful. From 2022 to 2025, travel customer acquisition cost rose 35% while customer lifetime value grew only 4.5%, and an estimated 27% of digital ad budgets are wasted on existing loyalty members.

**Revenue leakage: earnings that disappear after the sale.** Fragmentation creates failure points across settlement, commissions, billing, and local supply chains. Airlines lose 3–5% of global revenue this way; travel agencies lose 2–5% annually (a 3% leak can erase a year's profit margin); and at destination level, up to 80% of tourism spending can leak out of local economies when the supply chain is fragmented.

## Hidden Cost Breakdown

Three key areas where industry fragmentation creates measurable costs



**Why the fragmentation tax is now existential.** These costs don't just "add up." They compress two things that determine survival in a low-growth, high-volatility market: today's profit and tomorrow's relevance.

**Profit impact: a direct hit to margin.** Operational waste, inflated acquisition spend, and leakage translate into profit that simply vanishes. Research suggests companies can lose 20–30% of annual revenue when data is trapped in disconnected systems. The combined result: an average of \$12.9 million in annual hidden costs per mid-size operator.

**Innovation impact: the pilot trap.**

The more dangerous cost is strategic: fragmentation starves AI of clean, connected data, making it exceptionally hard to train models or deliver real-time personalization at scale. A 2025 McKinsey/Skift report points to siloed data and incompatible systems as a primary reason the industry struggles to get value from AI. This is how "AI everywhere" turns into "AI stuck in pilots."

Speed and trust are becoming the new price of entry. Fragmentation taxes both, every day. 'Integration' has not solved it; it has only managed it. What follows is the operating model that turns context into advantage.



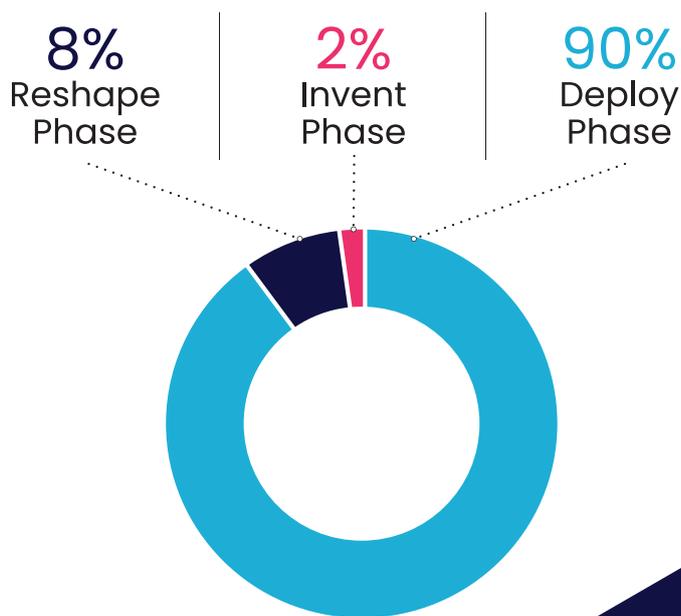
### 3. The Pilot Trap:

# Why 85% of AI Investments Fail

*From high adoption to low impact—and how to escape*

Across the industry, AI investment is rising fast, but measurable value is not keeping pace. The pattern is consistent: organizations can demonstrate “AI usage,” yet struggle to translate it into system-level advantage. The blocker is rarely model capability. It is the operating environment where AI is deployed; fragmented workflows, shallow integration, misaligned measurement, and unresolved deficits in data, trust, and skills. High adoption, low impact is a maturity problem. Most companies are still using AI at the surface level - standalone tools that boost individual productivity but do not reshape core processes. One maturity model describes three stages: “Deploy” (10–20% productivity gains), “Reshape” (30–50% function-level improvement), and “Invent” (AI-native business models). The critical point is where the market sits today: roughly 90% remain in “deploy,” running disconnected experiments that will not scale.

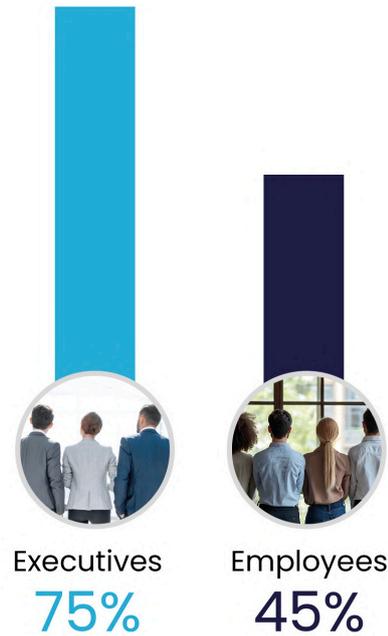
*AI Adoption Journey*



## Executive vs Employee Gap

Massive disconnect in AI success perception

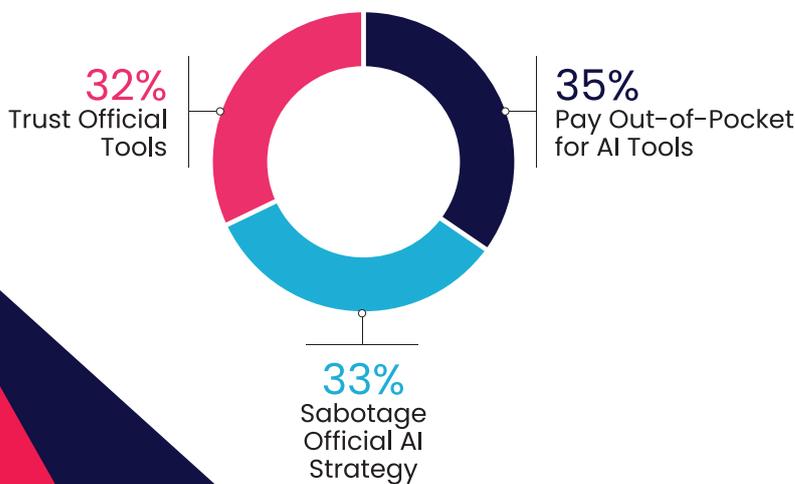
**The boardroom–frontline gap turns adoption into risk.** A second pattern explains why “adoption” often overstates progress: perception diverges sharply between executives and employees. While 75% of executives believe their AI rollouts are successful, fewer than half of employees agree, because they face the daily reality of clunky tools, unclear guidance, and inadequate training.



When official tooling fails to meet real workflows, “shadow AI” fills the gap. About 35% of employees pay for AI tools personally, and nearly one-third admit to sabotaging AI strategies via unauthorized use or ignoring security concerns... turning a productivity initiative into a data and compliance exposure.

## Employee Resistance Patterns

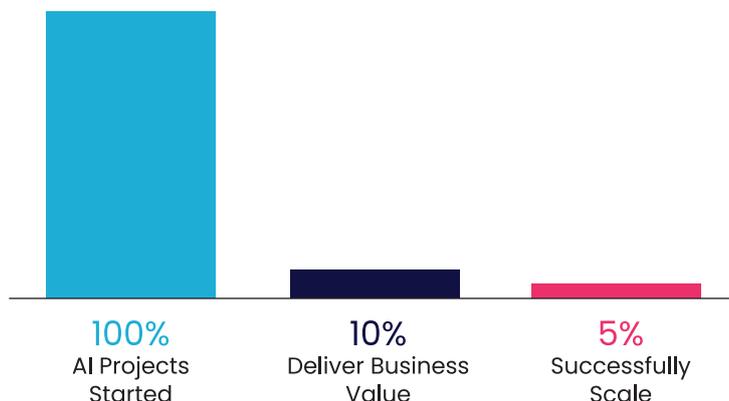
Shadow IT and strategy sabotage



**The pilot trap: activity without scaling.** Most organizations are stuck because they measure AI too narrowly. “Cost tunnel vision” prioritizes short-term, easy-to-audit savings, while missing up to 40% of total AI value (especially strategic advantages that compound over time). The result is predictable: funding flows to small, low-impact pilots, and the portfolio never graduates into scaled transformation. This leads to “death by a thousand pilots.”

The failure rate is brutal: estimates suggest 85% of AI projects fail to deliver real business value, and some studies put enterprise pilot failure at 95% with no meaningful revenue lift. The abandonment rate is also rising. One study shows the share of companies abandoning most AI projects jumping from 17% to 42% in a single year.

### **AI Project Success Funnel** 85–95% failure rate to deliver value



**Root causes that keep integration from compounding.** Under the pilot trap sit three foundational constraints:

**Data:** governance is not enablement. AI is only as strong as the data it can trust and interpret. The shift required is from managing data to making it usable – unique, context-rich, and operationally connected. In practice, “data strategy becomes AI strategy.” The numbers are clear: 85% of all AI model failures are caused by poor data quality.

**Trust: a compounding loop, not a soft issue.** Trust breaks internally (employees skeptical of leadership plans) and externally (customers concerned about misuse). Low trust reduces adoption and feedback; weak adoption produces weak data; weak data produces weak outcomes, reinforcing a “doom loop.” Nearly a quarter (23%) of employees do not believe their organization puts their interests first when implementing AI, and 63% of consumers are concerned about bias and discrimination in AI.

**Skills: the real gap is human–AI collaboration.** The constraint is both supply (e.g., an 8 million IT specialist gap projected in the EU) and design: most organizations still do not train teams to work with AI as a partner. The target state is “Centaur teams,” where AI handles repetitive analysis and humans own judgment, service design, and accountability.

**Bridge to the blueprint:** This is why “integration” alone is not delivering value: connecting systems without shared context, trusted data, and a scaling path simply accelerates complexity. The next section sets out the operating model required to turn AI from tool usage into compounding advantage, by designing for trust, contextual data, and collaboration from day one.

# 5. The Next Disruption: When Your Customer IS the AI

## Agent-to-agent commerce and the battle for visibility

Travel is entering a new competitive era. AI is no longer only a tool that helps humans analyze and decide; it is becoming an actor that can pursue goals, execute actions, and transact on behalf of a traveler or a business.

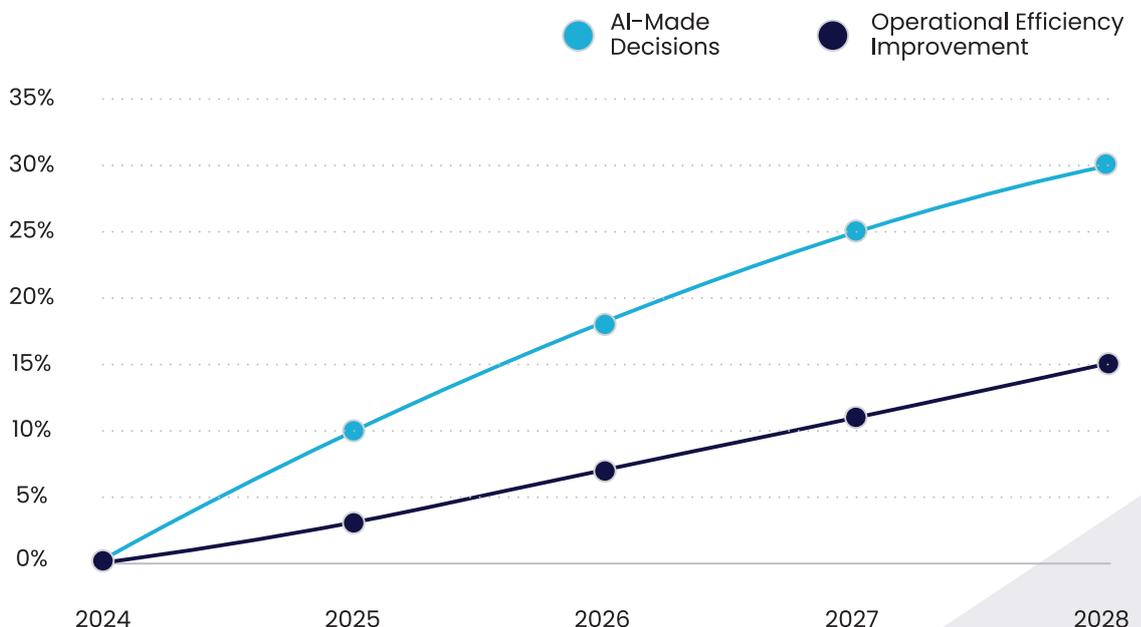
These autonomous AI agents... digital workers that can reason, plan, and act... will rewrite how travel is discovered, priced, sold, serviced, and optimized.

For an industry constrained by disconnected systems, this shift is not incremental. It creates a direct new battleground: the agent becomes the interface, and "context" becomes the advantage. As core AI capability commoditizes, the winners will be the companies whose real-world context is most usable (customer signals, operational knowledge, inventory truth, and partner rules) because that context is what makes agents reliable and commercially effective.

**Autonomy is accelerating, and the window is short.** The move from tool AI to agent AI is happening faster than most travel organizations are prepared for. In one survey, 73% of business leaders report that AI agents have improved operational efficiency by at least 30%. Gartner predicts that by 2028, at least 15% of work-related decisions will be made by an AI agent, up from virtually zero in 2024.

### Projected Impact: 2024-2028

Growth trajectory based on Gartner predictions and industry surveys



From agent-to-human to agent-to-agent: the new travel economy. The bigger leap is not a smarter assistant, it is an ecosystem. As agents become common, they will increasingly work with other agents, representing airlines, hotels, DMCs, ground transport, and payment providers. In practice, this means a traveler can express an outcome, not a workflow, and their agent can negotiate and coordinate across the supply chain automatically.

A simple example is enough to see the consequences. A traveler could set a goal like: “Plan a one-week sustainable food tour of Spain for two people in May, with a \$5,000 budget.” Their agent can then source flights, negotiate rooms, coordinate local experiences, book, and re-optimize when disruptions happen.

This is not science fiction economics. McKinsey estimates the technology behind these systems could add \$2.6 trillion to \$4.4 trillion in value annually. In travel, that value will flow to whoever becomes the most trusted, most interpretable, most transactable source of truth in the agent layer.

**The gating factor is trust, and travel is currently underprepared.** The agent economy does not fail because agents cannot act; it fails when nobody is comfortable letting them act. The trust deficit is already visible in corporate travel: only 10% of travel buyers trust AI-generated recommendations, and just 2% would allow an AI agent to book or change a trip without human approval.

### *The Trust Gap in Corporate Travel*

*Survey results showing the current state of AI trust*

10%

Trust AI  
Recommendations

2%

Willing to  
Automate

This trust gap creates a clear fork in the road. If the industry cannot provide verified, explainable, real-time context, agents will either stay in “assist mode” (low value) or consolidate power around a few platforms that can enforce their own standards. Either outcome threatens suppliers’ control over distribution, margin, and customer relationship.

The strategic question is no longer “How do we use AI?” It is: “When the next customer arrives as an AI agent, will it be able to find you, trust you, and transact with you... at speed and at scale?” The next section lays out the operating model required to win in that world: trusted contextual data, a shared language for interoperability, and a trust flywheel that compounds across the ecosystem.

# THE BLUEPRINT FOR ADVANTAGE

## 6. The Trust Flywheel: From Zero-Sum to Compounding Growth

*How shared intelligence creates measurable ROI*

The travel industry is paying a fragmentation tax every day; lost margin, slow decisions, and stalled AI value. Fixing this will not come from incremental integrations or one-off pilots. What's needed is a shared "operating system" for the AI era: a collaborative foundation that makes trusted context portable, measurable, and profitable across the ecosystem.

This blueprint is pragmatic by design. The goal is not to force a utopia overnight, but to build a fair, resilient, and profitable ecosystem step by step... starting with a strategic growth engine, anchored by an open technical architecture, protected by neutral governance, and justified through C-suite ROI metrics.

**The strategic engine: the flywheel of trust.** Industry change cannot be mandated; it must be incentivized. The Flywheel of Trust is the mechanism that turns "data sharing" from a risk into a compounding advantage; where each round of collaboration increases value, credibility, and adoption. The real hurdle is ignition: starting the flywheel requires a credible coalition of founding partners.



## The flywheel has **five stages**:

- 1** | **Standardization.** It starts with a unified data language. Without a shared syntax, trust cannot scale and context cannot travel.
- 2** | **Context sharing, with consent and privacy by design.** Once language is shared, participants can build a richer, real-time picture of travelers and markets... without turning privacy into a casualty. This is where privacy-enhancing technologies become a condition for participation, not an afterthought.
- 3** | **ROI realization: the “Context Dividend.”** Collective intelligence produces measurable financial return through hyper-personalization and operational efficiency, creating a dividend that participants can see on their P&L.
- 4** | **Broad adoption.** Visible ROI is the strongest incentive. When early adopters can prove gains, others have a rational reason to join—provided cost and access do not exclude smaller operators.
- 5** | **Talent attraction.** A data-rich, trusted ecosystem becomes a magnet for AI talent, which accelerates innovation and restarts the flywheel at a higher level.  
  
What makes this flywheel “executive-relevant” is that it solves the core tension leaders face right now: everyone needs better context to win in an AI-mediated market, yet no one wants to be the first mover without a clear return. The flywheel turns “first mover risk” into “first mover compounding.”
- 6** | **The technical engine:** five-layer architecture for the agent era. Strategy only compounds when the architecture makes it cheap to participate. This blueprint proposes an open framework that connects legacy systems to AI agents without forcing a rip-and-replace, and enables agent-to-agent commerce with accountability built in.

## The architecture is intentionally layered:

**Data language: GTIS (Global Tourism Intelligence Schema).** A universal syntax for travel data – the “digital rosetta stone” that prevents the ecosystem from splintering into new walled gardens.

**Shared semantic layer.** A common business dictionary so “booking,” “cancellation,” “refund,” and “stay” mean the same thing across systems, making data AI-ready and reducing ambiguity.

**Interoperability layer.** Modern APIs that connect old and new systems, preserving participation breadth and avoiding a high-friction rebuild.

**Agent Interoperability Framework (AIF).** The bridge into an agent-to-agent economy: autonomous agents can discover, negotiate, and transact directly, while the framework answers the most important non-technical question: who is accountable when agents are wrong?

**Trusted collaboration layer.** A privacy-protecting mechanism (e.g., Data Clean Rooms) that allows competitors to pool insights without exposing raw sensitive data, turning collaboration into a safe, repeatable business process.

The point of the five layers is not “more tech.” It is reducing the cost of trust: making it easier for partners to contribute context, verify meaning, collaborate safely, and transact reliably at machine speed.

**The foundation: neutral governance and profitable openness.** A technical plan without fair rules does not scale. For the ecosystem to work, participants must believe that rules are neutral, enforcement is consistent, and value sharing is credible. That is why the blueprint proposes independent governance via a WPTI Alliance and an Industry Ecosystem Council (IEC).

The incentive model is equally explicit: it must become more profitable to share than to hoard. The “Context Dividend” has to exceed the perceived value of keeping data locked away, otherwise the flywheel never starts.

Practically, this is how profitable openness becomes real: new revenue from opportunities visible only with end-to-end context; greater efficiency from reduced waste via real-time cross-journey signals; lower acquisition costs through precision targeting from shared insights; better resilience from early warnings via shared market signals; and privacy-enhancing technologies that allow insight sharing without raw data exposure.

**The value engine: a C-suite ROI framework.** Executives will not sponsor ecosystem transformation without a measurement system that reflects total value... not just cost reduction. This blueprint explicitly moves beyond narrow cost-cutting and measures ROI through a C-suite lens: efficiency, revenue, customer experience, and innovation/resilience.

The urgency is simple: most AI pilots fail to deliver measurable financial return, largely because organizations measure the wrong things and never redesign the operating model. A new ROI methodology is the difference between “AI activity” and “AI compounding.”

This framework ties “Context Dividend” to board-level outcomes: efficiency (lower operational cost and measurable waste reduction), revenue growth (higher customer value through helpful personalization), customer value and trust (loyalty, trust, and control over data), and innovation and resilience (faster speed-to-market and shock adaptation).

# 7. Four Blueprints that Deliver Value Now

## *Pricing, resilience, people, and customer control*

The connected architecture outlined in Part B is not a theory exercise. It is a profit engine. It converts the hidden costs of a fragmented industry into measurable financial returns, by making trusted context available at the speed the market now demands.

What follows are four practical blueprints. Each blueprint is a business outcome leaders already care about—revenue yield, operational resilience, workforce productivity, and customer control—made achievable by the same underlying capability: secure and trusted sharing of information across the ecosystem.

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### **Blueprint 1: Smarter pricing, more revenue.**

The problem is structural, not tactical. The industry still relies on rigid pricing models that treat travelers the same, because critical signals are trapped in disconnected systems. This leaves significant revenue unrealized precisely when markets shift fastest.

The solution is a context-powered pricing engine: it ingests real-time market information and a deep understanding of the traveler to generate dynamic pricing and perfectly timed, personalized offers. The executive point is not “more personalization.” It is the ability to price and package value in the moment... without breaking trust.

The proof is already directional: McKinsey reports that travel companies applying AI this way have seen over 6% annual revenue growth, and major hotel chains have increased

RevPAR by 5–10% with smarter, context-aware pricing. Over 85% of hoteliers expect to make more money from add-ons and ancillary services by 2025. Some hotels are seeing upsell conversions increase by 20–35%.

But “smart pricing” must graduate beyond the room rate. The real prize is total journey value; where attribute-based booking and real-time packaging turn add-ons into margin, not noise.

Leaders like IHG are already moving to “attribute-based booking,” where a customer can build their own perfect stay (a room with a view, late checkout, breakfast) and the system prices the entire package in real time.

What leaders should take away: pricing becomes a compounding advantage only when the system can explain itself. Transparency (“why the price changes”) is what prevents personalization from being perceived as surveillance pricing—and preserves long-term trust.

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## **Blueprint 2: A smarter, more resilient supply chain.**

Disruptions are the new norm. The travel supply chain remains fragile because visibility is partial and late; information sits in silos, so the network reacts after damage is already done. In 2024 alone, global supply chains saw a 38% increase in disruptions.

The solution is a predictive nervous system: shared, real-time signals plus AI forecasting plus cross-partner coordination. This turns a brittle network into a learning system that becomes stronger after shocks rather than weaker.

The airline blueprint shows what “predictive” means in operational reality. Delta’s AI system (APEX) used engine sensor data to predict failure risk; between 2010 and 2018 it reduced maintenance-related cancellations by a factor of 100 (from 5,600 to 55). This saves the company millions of dollars annually. In airport operations, AI-driven improvements have been shown to reduce ground delays by 6%. AI-powered predictive maintenance has been shown to cut maintenance costs by 12–18% and reduce unplanned downtime by 15–20%.

These principles are now being used across the entire travel industry. Hotels are using AI to predict demand for everything from food to linens, cutting waste and preventing shortages. The Venetian in Las Vegas used 70,000 sensors to create a predictive system that cut maintenance response times by 40%. Airports are using AI to speed up the turnaround of planes – including baggage processing, refueling, and catering – allowing for one extra flight per gate, per day.

The deeper point for travel leaders is that resilience is now a data problem before it is an operations problem. Without clean, trusted data and governance, even the strongest AI will fail, so “investing in tools” without “fixing the shared data spine” is a dead end.

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### **Blueprint 3: The empowered frontline employee.**

Frontline staff are the industry’s most valuable asset, and are often the least equipped. They face complex situations with broken tools and incomplete information, producing burnout and inconsistent service quality.

The solution is not replacement. It is elevation. AI co-pilots, powered by a complete, real-time view of the customer and the business, become a single interface that turns employees into expert problem-solvers. This is the practical model of a human-AI team: automation for routine steps, recommendations for next best action, and humans staying in control.

The productivity signal is strong: an MIT study found skilled workers using AI tools were 40% more productive. A McKinsey survey found that 59% of travel executives already report that AI is increasing their employee productivity. A study by Intercom showed that customer service agents using its AI co-pilot solved 31% more problems per day. This is already transforming the travel industry. IndiGo’s AI chatbot has cut the direct workload of customer service agents by 75%, freeing them up to handle more complex issues. Marriott is investing up to \$1.2 billion in 2024 in technology to empower its staff, including an AI-powered virtual concierge that gives employees instant access to expert local recommendations. Aimbridge Hospitality is using AI to give its 45,000 hourly employees more flexible schedules, leading to better work-life balance and higher job satisfaction.

The executive insight is consistency at scale. When every employee has the same trusted context, service becomes less dependent on individual heroics and more like a reliable system, raising quality while lowering cost-to-serve. Research shows that companies using AI to improve the employee experience have seen a 22% increase in engagement.

## **Blueprint 4: The traveler in control.**

The current system forces travelers into a difficult planning process while their personal data is controlled by large platforms. In an agent-driven future, the stakes rise: the “customer interface” shifts to a personal AI agent, and suppliers risk becoming interchangeable unless they are discoverable and trusted at machine speed.

The solution is a traveler-focused model: a personal AI agent works for the traveler, pulling information from an open, trusted network, returning control of data and journey design to the individual.

The proof is the gap: only 7% of travelers trust AI completely, yet 96% of those who have tried it are satisfied, and 84% plan to use it again... signaling that adoption is constrained less by demand than by trust and reliability. Meanwhile, Booking.com, Expedia, and Google are racing to build personal AI agents. Booking.com is working with OpenAI to build an AI Trip Planner that can handle complex requests. Expedia is building its own AI assistant, Romie, that will work inside apps like iMessage and WhatsApp. Google is using its powerful Gemini AI to turn its search engine into a travel agent that can build a complete, day-by-day itinerary for any destination.

For leaders, this blueprint is defensive and offensive at once: build the conditions for trust now, or cede the interface later. The rise of the personal AI agent will start a new “battle for the customer interface.” The new goal for a travel company is not to have the most engaging website, but to be the most reliable and data-rich source for the AI agents. The key to winning will be providing the most accurate and comprehensive information to the network.

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### **The common prerequisite:**

The four blueprints are not separate initiatives. Personalized offers cannot be fulfilled without a resilient supply chain; resilience cannot be executed without an empowered workforce; and traveler control cannot exist without system-level trust. The common prerequisite is secure, trusted information sharing, and the industry-level commitment to a single, open standard.

# 8. The People Imperative:

## Why AI Success is a Talent Strategy First

### *Redesigning work for human-AI teams*

AI value in travel will not be constrained by model capability first. It will be constrained by people: whether organizations can redesign work around human judgment, build a credible talent pipeline, and institutionalize continuous learning. Without a people blueprint, every technical blueprint remains potential; expensive, fragile, and difficult to scale.

This section sets out a four-part workforce strategy designed for executive action: a new operating model for human-AI teams, a rebuilt pipeline through academia and certification, a practical upskilling system for today's workforce, and a culture that makes learning inseparable from work.

#### **Redefining roles for human-AI teams.**

The winning operating model is not "AI replacing people." It is people elevated by AI. Where routine work is automated, and human value concentrates in interpretation, trade-offs, customer judgment, and ethical oversight.

Early evidence already points in the same direction across industries: when AI absorbs repetitive coordination and synthesis, human capacity shifts toward higher-value work. One Harvard study observed developers using an AI assistant spending 10% less time on boring project management and 5% more time on creative coding.

A 2023 study by Harvard and Boston Consulting Group found that professionals who worked this way completed 12% more tasks, finished them 25% faster, and produced work that was 40% higher in quality.

This requires redefinition at three levels: role design (job descriptions must move from task lists to judgment domains), skill design (the baseline competency is prompt-to-decision capability: asking the right questions, guiding the system through ambiguity, and spot-checking outputs), and leadership design (leaders are not simply managers of people; they are designers of a human-AI operating system).

Top performers already treat this as a people-and-culture transformation, not a tech rollout... allocating a minority of effort to tools and the majority to adoption, behavior, trust, and governance. As autonomy increases, leadership accountability tightens. AI has no legal or social accountability; responsibility sits with the organization. The leadership question evolves from “did my team do the right thing” to “did I design a system that makes it hard to do the wrong thing.”

### **Rebuilding the talent pipeline.**

Corporate training alone cannot fill the gap. The travel sector needs a pipeline strategy that closes the disconnect between traditional education and the mixed skills the AI economy demands: business judgment, data literacy, technical fluency, and ethical governance.

The practical path is deeper collaboration with universities, beyond guest lectures, so industry problems shape curricula and research, and learning becomes simulation-rich and decision-oriented. Leading universities are already doing this, launching massive, billion-dollar AI programs in partnership with companies like IBM.

To make this scalable in a global industry, certification becomes the standard-setting layer: a common language for “human-AI collaboration skills” that reduces hiring friction and makes capability portable across markets and employers. In digital marketing, for example, industry-led certifications have become the global standard, leading to higher rates of promotion and better pay for certified professionals.

Done properly, certification is not only a talent signal. It is also a governance tool: defining what it means to be “qualified” forces alignment on privacy, ethical practice, and bias controls, embedding responsible AI norms into the workforce from day one.

## Upskilling the current workforce

The immediate constraint is not future graduates; it is today's teams. The required shift is from one-off training to continuous co-learning... humans and AI learning from each other inside the workflow.

The urgency is visible: while 84% of leaders expect employees to work with AI soon, only 26% of workers have received training. This gap produces inconsistent use, poor feedback loops, and stalled value.

A practical co-learning model looks like this: the AI co-pilots in the flow of work, humans accept/reject/edit recommendations, and that feedback becomes the training signal for both parties - the AI improves, and the human learns faster.

A modern call center is a perfect example: a human agent takes a call while an AI co-pilot listens in, suggesting the best things to say. When the human agent ignores or edits an AI suggestion, the AI learns from that correction and gets smarter for the next call.

To govern this model, measurement must change. Old KPIs track individual output; human-AI work requires collaborative metrics that reflect the health and performance of the partnership—combining operational indicators (e.g., handle time, escalation rate) with human trust signals (e.g., confidence in AI recommendations).



## **The cultural shift: from learning-to-work to working-to-learn.**

The final constraint is culture. New roles, new pipelines, and new training systems fail without an environment where learning is continuous, safe, and operational, not occasional and ceremonial.

The ultimate advantage in a fast-changing, AI-powered world is not technology; it's agility. And agility comes from a culture where continuous learning and experimenting are a normal part of the job. Companies with a strong learning culture are 1.4 times more likely to see their profits grow year-over-year. Their employees also report having eight times more trust in leadership.

In the AI era, agility is the advantage, and agility comes from making work the classroom: learning delivered in small, targeted units at the moment of need, embedded directly into tools and processes.

Companies that get this right have seen a 300% increase in employee engagement with training and, in one case, a 66% increase in sales in just three months.

The culture must be closed-loop: lessons from frontline human-AI teams are captured, shared, and used to update playbooks, tools, and even university programs. That feedback loop is what prevents capability decay and keeps the system improving under real market pressure.

This is why AI transformation is human transformation first. A connected architecture creates potential; an empowered workforce turns that potential into compounding value.



## 8. Your Roadmap:

# From Audit to Ecosystem Leadership

### *The 4-stage path and sector-specific first moves*

The diagnosis is complete, the blueprint is designed. What separates winners from laggards now is execution speed. Fragmentation will keep taxing margin and slowing decisions; connected context will start compounding advantage. This playbook translates the WPTI vision into a practical path leaders can sponsor, teams can deliver, and partners can join with confidence.

Joining the new system: a four-stage roadmap. Travel has lived too long in walled-off, proprietary stacks... "API chaos," duplicated work, and bloated distribution cost.

The industry's choice is no longer philosophical: continue fighting inside a broken zero-sum system, or help build an open network where value scales with participation.

The operating rules are simple: be transparent, be trustworthy, and design for win-win outcomes... because hoarding has not protected the industry; it has locked in inefficiency and blocked innovation.

## Four stages:

- 1 Audit and align (the GTIS audit).** Start with a context-gap assessment: how your current data structures (PMS/CRS and adjacent systems) map to GTIS core definitions, and how easily your data can be consumed by modern AI systems. Use the WPTI self-assessment toolkit to establish an AI-readiness score and identify the smallest set of changes that unlock interoperability.
- 2 Adopt and get a quick win.** Move from analysis to value. Adopt existing standards that deliver near-term returns. For airlines, accelerating IATA NDC and ONE Order is the cleanest path from legacy PNR fragmentation toward a single modern commercial record, and a faster runway to retailing and personalization.
- 3 Participate and contribute.** Once you have implementation experience, join working groups shaping the standards. Standards only solve real problems when operators, platforms, and suppliers with real edge cases are in the room. Participation converts “compliance” into influence.
- 4 Lead and co-create.** Leadership is not only adoption; it is governance. Champion the standards, help build the next layer of tooling, and co-govern the open network so neutrality and credibility are protected as the ecosystem scales.

**You are not alone: the support system.** This roadmap works only if the cost and risk of joining are reduced. Industry alliances are designed to provide that safety net: open-source tools and reference guides, shared research, shared R&D, interoperability assurance, and training/certification... so participation is not limited to giants.

**The universal foundation:** three skills every organization must build. Technology does not transform a business; capability does. A successful AI-powered travel industry depends on upgrading the workforce in three areas: AI and data literacy (understanding that high-quality, real-time context is the fuel of every intelligent system), ethics and privacy (responsible data stewardship must be operationalized), and collaboration and adaptability (the durable advantage is a workforce that can collaborate in human-AI teams and operate in a “working-to-learn” culture).

**Role-based execution:** a clear path for frontline, managers, and the C-suite. A connected system creates a virtuous cycle of intelligence, but each layer of the organization must play a different role for that cycle to hold.

Frontline staff move from transaction processing to experience enhancement—using smart tools to automate repetitive tasks while capturing cleaner, richer data that feeds the system. Specialists and managers shift from reactive firefighting to proactive strategy—using predictive analytics and smart pricing to turn dashboards into decisions. Executive leaders evolve from running an operator to orchestrating an ecosystem—defining the digital strategy, sponsoring governance and standards, and building the culture that makes adoption real.

**Sector playbooks:** first moves that create advantage. The principles are universal, but the first moves are sector-specific. This section focuses on what to do first—where value is immediate, and where risk is existential.

**Hotels:** escape the commodity trap with a context-rich guest journey. Build hyper-personalized journeys that lift ancillary revenue and loyalty, using AI before the stay (conversion support), during the stay (anticipation and service recovery), and behind the scenes (forecasting, staffing, predictive maintenance). The goal is measurable uplift: 68% of hospitality companies expect AI to dramatically improve the guest experience in the next five years.



**OTAs and platforms:** evolve into journey planners or get bypassed. AI search tools can assemble itineraries in seconds, potentially routing demand away from intermediaries. One cited study suggests that in Google's AI Mode, less than 10% of bookings went through an OTA. The counter-move is to use the platform's strongest asset—its data—to build an AI-native planning experience that generic search cannot replicate.

**Airlines:** accelerate “offers and orders” to become true digital retailers. Speed up the move toward “100% offers and orders” through NDC/ONE Order to replace fragmented legacy records with a modern commercial foundation, enabling better disruption management and higher-margin personalization at scale.

**Travel agencies:** choose a side; high-tech specialist or high-touch expert. The mushy middle is dead: either become a high-tech operation that uses AI to automate service and itinerary building, or become an irreplaceable human expert using AI as a co-pilot to deepen relationships and solve complex cases with nuance.

**Tech providers:** build the operating system, not another feature. The opportunity is to deliver open, AI-native, context-aware platforms that reduce fragmentation for everyone. The market will reward systems that make interoperability cheap, not stacks that create new walled gardens.

# CLOSING

Travel is an industry built on connection; connecting people to places, cultures, and experiences that change their lives. Yet the systems that power this industry remain profoundly disconnected.

The fragmentation tax is real. The AI pilot trap is real. The agent economy is coming faster than most organizations are prepared for. But the solution is equally real: a shared operating system built on trusted context, fair governance, and profitable openness.

**The question is not whether the industry will become more connected and intelligent.**

**The question is who will lead this transition.**

By 2028, 15% of travel decisions will be made by AI agents. The companies that become visible, trusted, and transactable to these agents will control the customer interface. Those that remain trapped in isolated systems will become invisible, competing only on price, with eroding margins and no direct relationship with the traveler.

The companies that built the internet won by making information open and accessible. The companies that will win the AI era will do the same with context.

**The window is 12 months. The choice is yours.**

Will you be among the 15% who succeed, or the 85% who remain stuck in pilots while the market moves on?



**We are the catalyst, not the controller.**

Dida’s mission is to remove complexity from global travel distribution. For decades, isolated development created the fragmentation that now costs the industry \$12.9 million per operator annually. We believe the industry’s shared problems require shared solutions.

The White Paper on Tourism Intelligence (WPTI) is our blueprint for that shared future. The WPTI Alliance is the platform where industry leaders come together to build it.

**OUR ROLE**

- » Convene the conversation
- » Build the open-source tools
- » Prove the model works

**OUR COMMITMENT**

- » Your data remains yours
- » Standards are governed by the industry, not by Dida
- » Everything we build is open and interoperable

The future of travel will not be built by a single company, no matter how large. It will be built by leaders who recognize that shared intelligence creates more value than proprietary silos.

**This is your invitation to help design that future**



➤ White Paper on Tourism Intelligence  
Executive Edition | 2026



**Travel distribution in the  
machine-to-machine era.**  
**How will your customers find you?**

Learn more: [www.dida.com](http://www.dida.com) | Contact: [wpti@dida.com](mailto:wpti@dida.com)