



## Digital Transition in public transport

Opportunities and points of concern

10 June 2022

# How can digital transition make travel easier for European Passengers and how European Policymakers can contribute to it?

## A distribution perspective

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# eu travel tech: technology is changing travel, let us tell you how!

## FULL MEMBERS



## ASSOCIATED MEMBERS



## STRATEGIC PARTNERS





# Travel Tech intermediaries

## Global distribution systems (GDSs)



GDSs aggregate content from travel service providers and other sources and provide technology solutions to both travel providers and travel sellers to make their distribution more efficient.

## Metasearch engines

Facilitate the choice of consumers by displaying travel options and directing them to supplier and OTA websites and apps to book their travel.



## Online Travel agents



Online consumer-facing platforms distributing travel services to travelers (“OTAs”)

## Travel Management Companies

Travel agents that fully manage the business travel requirements for individuals, companies, and organizations (“TMCs”).



## What can digital travel intermediaries bring to European Passengers when they travel?

- Eu travel tech members are **independent intermediaries**, unaffiliated with any transport operator. As such, they have no control over the direct operation of transport services: **we cannot make trains arrive on time even if we want to!**
- However, their role is critical for passengers, and even more so for multimodal travel:
  - By definition, multiple transport operators are involved in a multimodal journey.
  - Therefore, none of them is in a position to assist the passengers throughout their travel, from journey planning to post-journey issues.
- ✓ **Travel intermediaries could be the single point of contact for passengers throughout their (often multimodal) trips.** They are able to offer familiar interfaces and customer service options in travellers' native language, wherever they are travelling. This is not the case for most transport operators.
- ✓ But they can perform this key information role only within the right EU policy framework, ensuring they get access to the relevant data from the transport operators.

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**For long distance multimodal trips, what are you currently missing the most as passengers?**

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Adequate information on possible travel options?



Adequate booking options for each of those travel options?



Adequate multimodal passengers rights?



## Case study: a family under the Tuscan sun!

- Emmanuel and Marie have 2 daughters, Joséphine (5) and Agathe (2). They live in Brussels and want to visit Tuscany for their summer holidays. They are environmentally conscious and would like to optimise their journey, limiting CO2 emissions as much as possible.
- They are therefore considering booking an air-rail trip, going from Brussels to Florence by combining different modes of transport.





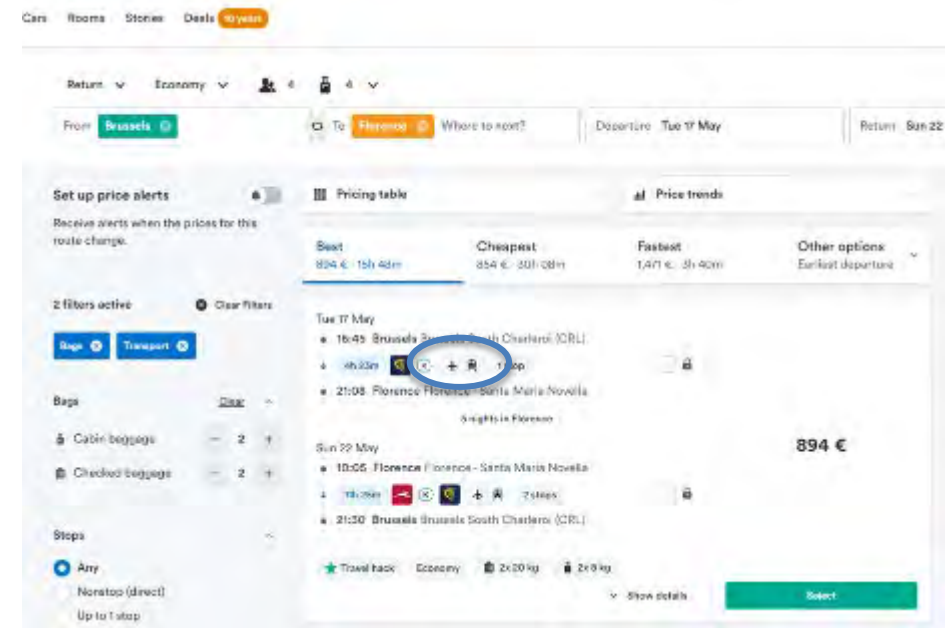
## Before the trip

Emmanuel and Marie are first looking for their travel options.

Travel intermediaries can *“help both passengers and/or other intermediaries compare different travel options, choices and prices, and can facilitate the sale and re-sale of mobility products from different operators, whether they are private or public, within one mode or across modes”\**

On OTA platforms, Emmanuel and Marie could:

- ✓ Compare and combine offers from different modes of transport.
- ✓ get access to all relevant precontractual information : schedules, connection times, fares but also ancillary services and CO2 emissions information





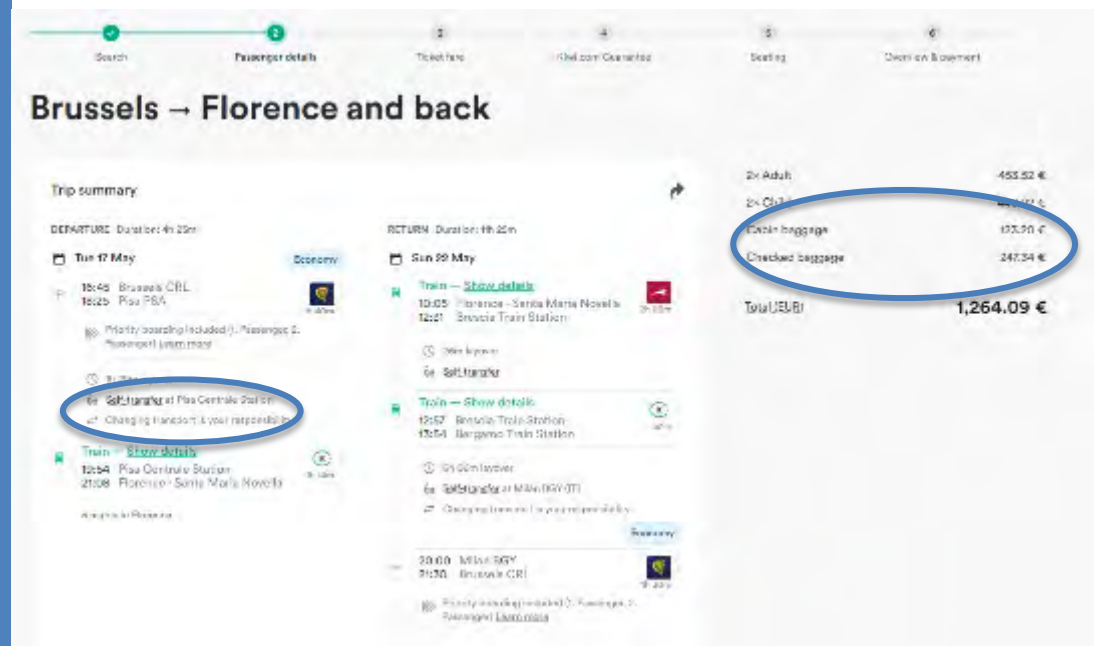
## Before the trip

Emmanuel and Marie need a lot of information before being able to make their choice, such as:

- Air segment: possibility for the baby equipment to be transported and for the whole family to be seated together without additional costs (or for which additional costs?)
- Connection times and existence of a convenient transfer option between the airport and the rail station

Such information is currently too often missing on travel intermediaries platforms as relevant data is purposefully not shared by transport operators or not shared under FRAND terms.

- **Building such a multimodal journey can prove very cumbersome!**



**Brussels → Florence and back**

**Trip summary**

DEPARTURE Duration: 4h 25m

**Tue 17 May** Economy

18:45 Brussels CBL  
19:25 Pisa PSA

Priority boarding (included) | Passages: 2  
Passenger: 1 (adult)

Self-transfer at Pisa Centrale Station  
Changing transfer: it your responsibility

Train - Show details  
12:54 Pisa Centrale Station  
21:08 Florence Santa Maria Novella

www.trenitalia.com

RETURN Duration: 1h 25m

**Sun 22 May**

Train - Show details  
10:05 Florence Santa Maria Novella  
12:21 Brussels Train Station

2nd class  
Self-transfer

Train - Show details  
12:57 Bergamo Train Station  
13:54 Bergamo Train Station

1st class  
Self-transfer at Milano (BGVOT)  
Changing transfer: it your responsibility

www.trenitalia.com

20:00 Milano SBY  
21:00 Brussels CBL

Priority boarding (included) | Passages: 2  
Passenger: 1 (adult)

2x Adult 455.52 €  
2x Child 100.00 €  
Checked baggage 102.50 €  
Checked baggage 247.34 €  
**Total (UEBI) 1,264.09 €**



## Multimodal Digital Mobility Services Initiative

“The deployment of multimodal mobility services can provide the user with a more seamless travel experience through more and better information on travel options and facilitated booking/ticketing”

European Commission, MDMS IIA, 2021

Initiative announced in the Sustainable and Smart Mobility Roadmap in 2020

- Will aim at facilitating comparison and combination of available travel options through journey planning and ticketing intermediaries
- Will cover all modes of transport: local public transport, rail, road, air.

Status: impact assessment ongoing, legislative proposal in Q1 2023



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**As a passenger, what are your favorite platforms to prepare your cross-border trips?**

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Platforms operated by transport services providers (SNCF connect, DB Navigator...)



Platforms operated by independent travel agents (Trainline, eDreams, Omio...)

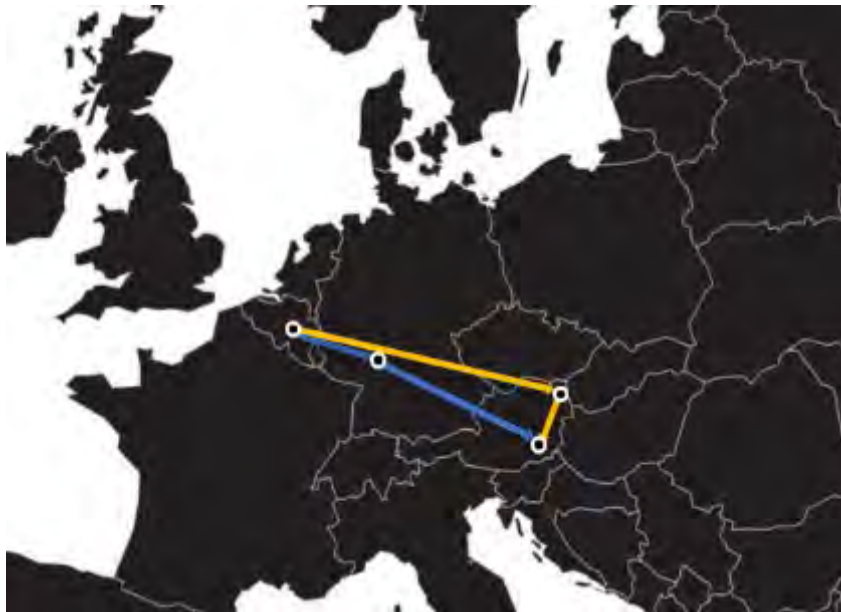


Journey planners without booking options (Google maps...)



## Multimodality in Europe – The Problem

### Case study: Brussels - Graz



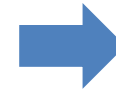
#### Single-mode trip:

Brussels - Frankfurt (air)  
Frankfurt – Graz (air)

Price: EUR 128

Duration: 4:30 h (+ transfer)

Emissions: 181 kg CO<sub>2</sub>



- Highly visible
- Easily searchable, bookable, payable
- Indirect channels impacted by unfair practices (e.g. withholding cheapest options)

#### Multimodal trip:

Brussels – Vienna (air)  
Vienna – Graz (rail)

Price: EUR 76 (61 air + rail)

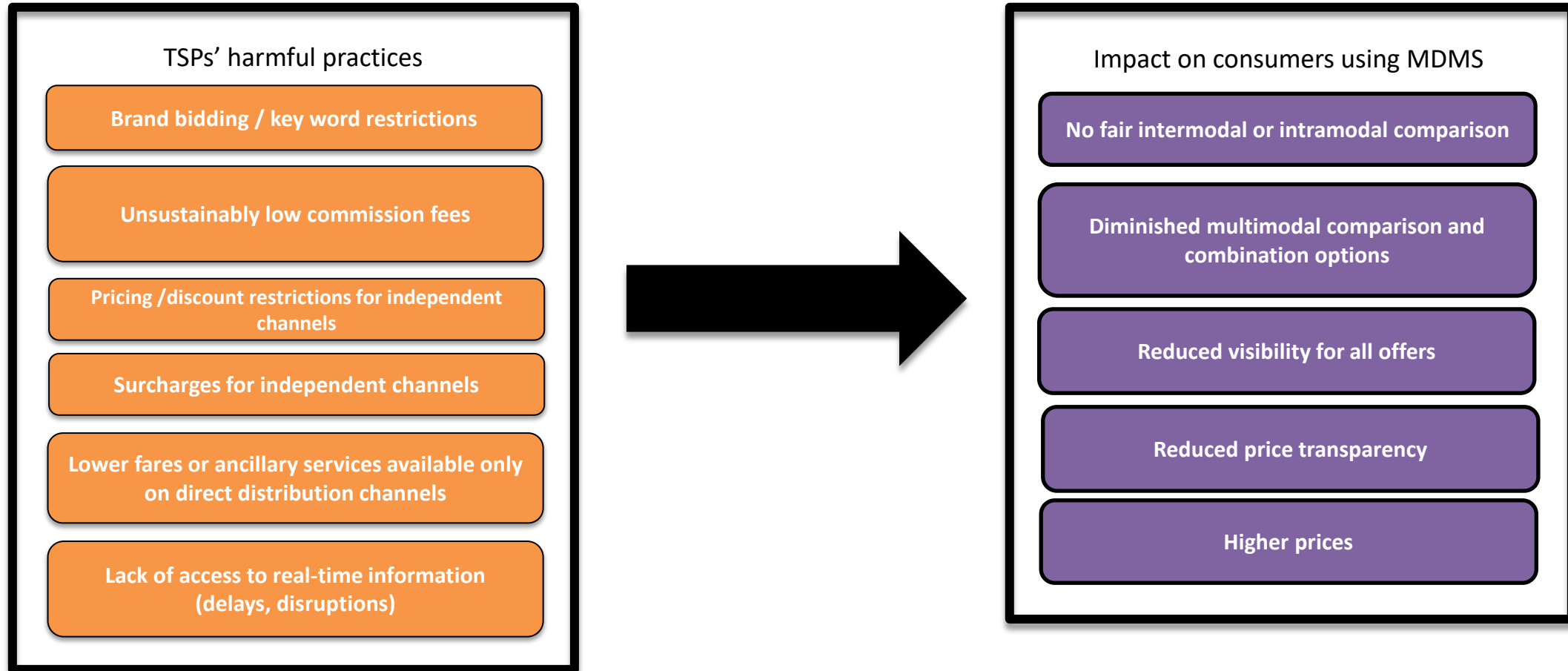
Duration: 6:00 h

Emissions: 119 kg CO<sub>2</sub> (107 + 12)



- Invisible to travelers
- Not easily searchable, comparable, bookable, payable
- Lack of content access and unfair practices preventing fair competition and combination of modes

## Impact of disintermediation strategies





## Making multimodal travel planning easier

1. Access to content of transport operators is the fundamental precondition for multimodal platforms to be able to transparently distribute all modes of transport and play their role as modal shift enablers.
2. Multimodal platforms must be enabled by law to distribute transport services under “fair, reasonable and non-discriminatory (FRAND)” distribution agreements providing a level playing field.
3. Such obligations and rights must be supported by a strong enforcement framework: designated enforcement authorities, clear procedural framework.

The upcoming Regulation on Multimodal Digital Mobility Services offers a unique opportunity to address current market challenges and facilitate fair competition, increased consumer choice and more sustainable travel options.

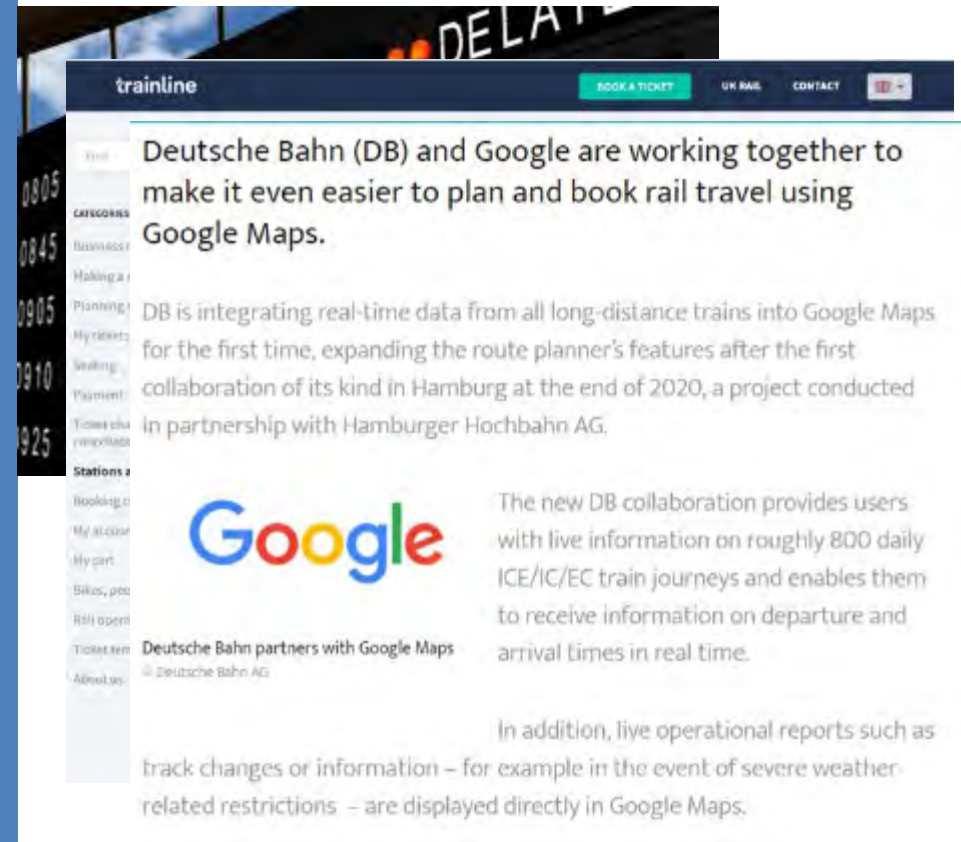


## During the trip

Emmanuel and Marie have booked their tickets and it is now time to leave. Before going to the airport, they would like to check that their trip will not suffer any disruption:

- Confirmation that the flight/rail trip will not be cancelled (quite useful in COVID times)
- Existence of any delays or change in their travel information (change of terminal, platform).

Such information is not always made available to travel intermediaries. Although it is available to some of them.



The screenshot shows a news article on the trainline website. The article title is "Deutsche Bahn (DB) and Google are working together to make it even easier to plan and book rail travel using Google Maps." The text states that DB is integrating real-time data from all long-distance trains into Google Maps for the first time, expanding the route planner's features after the first collaboration of its kind in Hamburg at the end of 2020, a project conducted in partnership with Hamburger Hochbahn AG. A sub-headline reads "The new DB collaboration provides users with live information on roughly 800 daily ICE/IC/EC train journeys and enables them to receive information on departure and arrival times in real time." Another part of the article mentions "In addition, live operational reports such as track changes or information – for example in the event of severe weather-related restrictions – are displayed directly in Google Maps."



## During the trip

Fortunately, the Rail Passenger Rights Regulation addresses the issue: **ticket vendors have to inform their customers in case of disruption**, an obligation supplemented by an obligation for rail operators to provide such real-time information to their ticket vendors.

Will get into force in 2023

- Need for a similar obligation for all modes of transport. Passengers should be treated equally wherever they book!

### REGULATIONS

REGULATION (EU) 2021/782 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL  
of 29 April 2021  
on rail passengers' rights and obligations  
(recast)

Article 10

#### Access to traffic and travel information

1. Infrastructure managers shall distribute real-time data relating to the arrival and the departure of trains to railway undertakings, ticket vendors, tour operators and station managers.

2. Railway undertakings shall provide other railway undertakings, ticket vendors and tour operators that sell their services with access to minimum travel information set out in Annex II, Parts I and II, and to the operations on reservation systems referred to in Annex II, Part III.

3. Information shall be distributed and access shall be granted in a non-discriminatory manner and without undue delay. A one-off request shall be sufficient to have continuous access to information. The infrastructure manager and the railway undertaking obliged to make available information in accordance with paragraphs 1 and 2 may request the conclusion of a contract or other arrangement on whose basis information is distributed or access is granted.

The terms and conditions of any contract or arrangement for the use of the information shall not unnecessarily restrict possibilities for its reuse or be used to restrict competition.

Railway undertakings may require from other railway undertakings, tour operators and ticket vendors a fair, reasonable and proportionate financial compensation for the costs incurred in providing the access, and infrastructure managers may require compensation in accordance with the applicable rules.



## During the trip

Emmanuel and Marie have decided to opt for an air-rail journey, with a “self-transfer”: no connection guarantee, as opposed to through-ticketing in rail or interlining in air.

However, travel intermediaries are developing alternative solutions to allow their customers to get adequate assistance in case of a missed connection:

- In air, for “virtual” interlining (an intermediary builds a journey with two different flights, in order to offer the best possible fare to its customers), the intermediary can take liability for the connection through a “self-transfer guarantee”.
- For air-rail journeys, there are already similar products.

➤ **Journey continuation is a key issue for multimodal travel**

### TripStack Self-Connect

#### Dohop Connect

These are the Terms on which Dohop supplies Dohop Connect to the Customer. A reference is made to the definitions in chapter 1.

Dohop Connect is comprised of services which enables booking of Self-Connecting Trips and in case of travel disruptions, provides Customers with the Services and access to the Customer Assistance Programme.

The purpose of Dohop Connect is to make your self-connecting journey more secure and comfortable in case of travel disruptions where a trip is rescheduled, delayed or cancelled by the Booking Agent, causing the Customer to miss one or more Connections to the Customer's final destination. Booking flights via Dohop is possible only if the Customer purchases Dohop Connect and pays the Dohop Connect Service Fee. This also entitles the Customer to participate in the Customer Assistance Programme. The Customer Assistance Programme is a discretionary service and available to the Customer for the duration of the Dohop Connect Itinerary and is subject to the Terms specified herein.





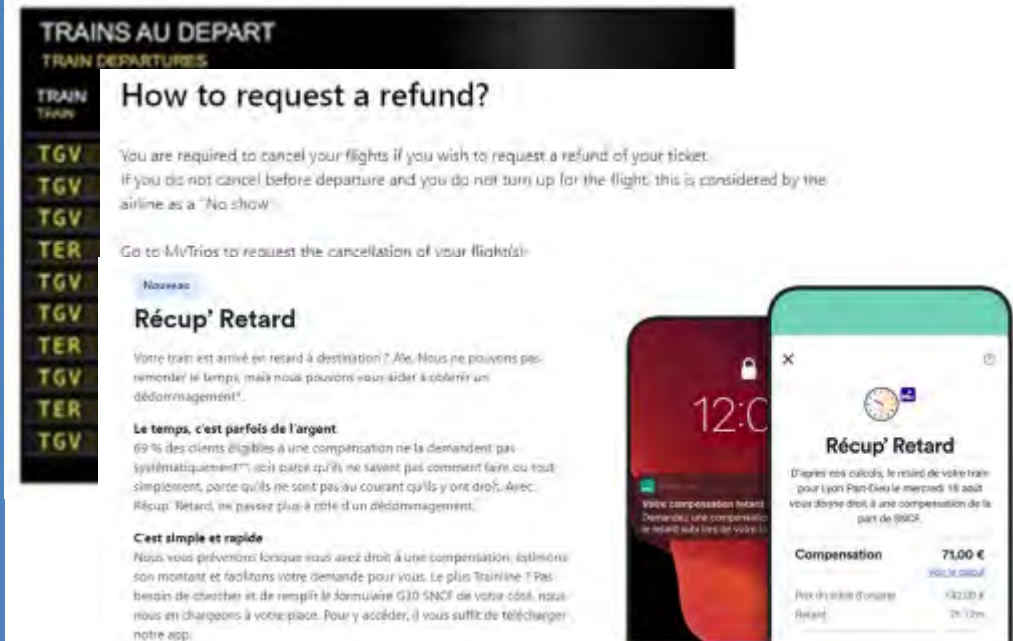


## After the trip

Unfortunately, Emmanuel and Marie have seen their train being delayed on their way back, opening the possibility for them to get a **compensation**.

COVID-19 has shown how difficult getting a refund or compensation from a TSP could be. It could even prove harder when you deal with multiple TSPs in multiple countries, with interfaces not always available in your own language.

- In case of cancellations, refunds can be claimed through the intermediary.
- Travel intermediaries can also assist passengers in their compensation claims, serving as a **one stop shop** for all claims related to a given journey.



**TRAINS AU DEPART**  
TRAIN DEPARTURES

**How to request a refund?**

You are required to cancel your flights if you wish to request a refund of your ticket. If you do not cancel before departure and you do not turn up for the flight, this is considered by the airline as a "No show".

Go to MyTrips to request the cancellation of your flight(s).

**Récup' Retard**

Notre train est arrivé en retard à destination? Ah, Nous ne pouvons pas remonter le temps, mais nous pouvons vous aider à obtenir un dédommagement!

**Le temps, c'est parfois de l'argent.**  
69 % des clients éligibles à une compensation ne la demandent pas systématiquement, soit parce qu'ils ne savent pas comment faire ou tout simplement, parce qu'ils ne sont pas au courant qu'ils y ont droit. Avec Récup' Retard, ne payez plus à titre d'un dédommagement.

**C'est simple et rapide**  
Nous vous prévenons lorsque vous avez droit à une compensation, estimons son montant et facilitons votre demande pour vous. Le plus rapide? Pas besoin de chercher et de remplir le formulaire G10 SNCF de votre côté, nous nous en chargeons à votre place. Pour y accéder, il vous suffit de télécharger notre app.

**Récup' Retard**

D'après vos calculs, le retard de votre train pour Lyon Paris-Est le mercredi 18 août vous donne droit à une compensation de la part de SNCF.

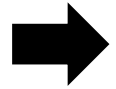
<b>Compensation</b>	<b>71,00 €</b>
Prix de votre billet	142,00 €
Retard	2x 12m

## Travel – better protection for passenger and their rights

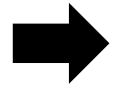
- As part of the Sustainable and Smart Mobility Roadmap, the Commission will review the passenger rights regulatory framework:
  - ✓ Resilience to extensive travel disruptions (such as COVID)
    - Refunds, insolvency protection
  - ✓ Options for multimodal tickets
    - Consistency between existing frameworks, journey continuation, information to passengers
  - ✓ Better enforcement of passenger rights



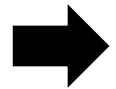
## Passenger rights and multimodal travel: the role of intermediaries



With multimodal itineraries involving by definition multiple operators, operating under different legal, technical and commercial conditions, implementing passenger rights will be challenging.



In this context, travel intermediaries can fill a gap and be the one-stop-shop ensuring a seamless trip to the passengers and providing them with all relevant information regarding their rights, before, during and after the trip.



However, this is entirely dependent on such travel intermediaries getting access to the relevant data from transport services providers!



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# Multimodality in Europe: the vision

