



They Don't Compete. They Govern.

Why the global travel sector is no longer a market — and what replaces competition when exit disappears.

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For decades, the travel industry has been described as a competitive market. Airlines competed on price and service. Hotels competed on comfort and loyalty. Platforms competed on convenience and choice.

That story still appears in earnings calls and brand decks. But behavior no longer supports it.

Over the past two years (2024–2025), we studied global travel not as a market of brands competing for preference, but as a system people are increasingly forced to use. We focused on repeated behavior: how people actually book, move, stay, verify, complain, and adapt when travel becomes expensive, regulated, and hard to exit.

*What emerged wasn't a ranking. **It was a structure.***

Travel is no longer a journey. It's a Governance Stack.

Modern travel operates as a sequence of compulsory systems. When exit becomes costly or impossible, competition gives way to governance. Authority fragments into five distinct roles imposed by the pressure of the system.

1. Constraint Sovereignty (Governing obedience)

The Actor: Ryanair Every governed system requires a lower bound: how much friction and compliance people will tolerate to keep moving. Ryanair governs that boundary. Its power comes from making rules explicit, harsh, and learnable.

*Failure is framed as operator error, not institutional betrayal. This role stabilizes the entire field by **normalizing obedience**.*

- ***The Risk:*** Inconsistency. When constraint stops being predictable, legitimacy collapses.

2. Procedural Authority (Governing choice collapse)

The Actor: Booking.com At scale, choice is a liability. Booking governs allocation by collapsing infinite possibility into defensible defaults: badges, rankings, and receipts. Users don't ask Booking to inspire them; they ask it to decide for them quickly and justifiably. Trust here is procedural, not emotional.

- **The Risk:** Pretending neutrality. People don't want kindness from a referee; they want decisiveness.

3. Normative Authority (Governing legitimacy)

The Actors: Marriott / British Airways Somebody must represent "how serious people do this." Marriott and British Airways are the institutional memory of "proper" travel. They are the credit-card rails, the hub systems, and the status ladders. They win because they are **correct**, not because they are exciting.

- **The Risk:** Identity drift. When legitimacy systems chase "flexibility" or "boutique storytelling," they create expectations their infrastructure cannot meet.

4. Contested Authority (Governing social overflow)

The Actor: Airbnb Every system produces excess it cannot comfortably hold: long stays, groups, housing tension, and civic backlash. Airbnb governs at the boundary—where the system is argued with. Its power persists because it is contested. Backlash is not a messaging failure; it is evidence of operating at the edge of what society can metabolize.

- **The Risk:** Regulatory fragmentation—the "frontier" being closed by the state.

5. Containment Authority (Governing elite insulation)

The Actor: Aman Luxury is not freedom from the system; it is paid containment. Aman governs emotional insulation and status legitimacy for a narrowly gated population. It sells **disappearance** while growing through very public institutional proof formats. In a governed system, even silence requires verification.

- **The Risk:** A break in the promise of sanctuary.

The uncomfortable truth: Roles are not optional

These roles are assigned by the system, not chosen by the brands.

- Ryanair cannot become caring.
- Booking cannot become emotional.
- Marriott cannot become flexible.
- Airbnb cannot become uncontroversial.

Every time a company tries to escape its role through narrative repair or feature imitation, the system pushes back. Not with collapse, but with **misalignment**. Friction increases, cynicism grows, but usage persists. Backlash does not lead to exit; it leads to migration within the field.

The real strategic risk: Misrecognition

The greatest danger facing companies in this sector is not disruption. It is **misrecognition of their own authority**.

When a company misunderstands the kind of power it holds, it optimizes the wrong metrics and fixes the wrong problems. The most durable actors in infrastructure-like systems are those who accept being:

- **Harsh but predictable** (Constraint)
- **Boring but decisive** (Procedural)
- **Rigid but legitimate** (Normative)
- **Controversial but necessary** (Contested)

A final provocation

The question for travel leaders is no longer: “How do we compete better?” It is: “Do we understand the role the system has already given us — and are we trying to be something else?” In a governance stack, **identity drift** is more dangerous than market-share loss. The field is far less forgiving than the brand deck.

Methodology This paper is based on behavioral evidence from two locked Fame Index cycles (FY24–FY25). All comparisons are kernel-anchored, reproducible, and HASHLOCK-enforced.

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