

Current and Future tourism distribution channels – Part 5

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Six months later – The world has changed

A little bit less than six months ago we started to look at distribution channels in tourism and hospitality in the past, present and future.

The past is the same as in September 2025, however present and future are already very different from how they were then.

Today we will do a summary of what we discussed in the last four sessions and will look then at the new developments shaping tourism distribution today and tomorrow.

Content of today's lecture

1. Review: Traditional Distribution Channels, examples of distribution companies, new distribution channels and new technology up to 2025
2. Situation 2026 and beyond: New structures for information, decision-making and purchasing of tourism and hospitality services
3. Moving from Generative to Agentic AI in tourism distribution
4. Conclusion: Skills you need for Tourism Distribution

Review: Traditional Distribution Channels, examples of distribution companies, new distribution channels and new technology up to 2025

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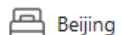
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What brought us from
this ^
to this
< ?

History of tourism distribution

In the 19th century, distribution primarily relied on personal networks and early intermediaries.

The first emerging travel agencies and tour operators already provided personalized assistance, itinerary planning, and expertise. These entities acted as the primary link between suppliers (such as transportation providers and accommodations) and travellers.

Thomas Cook is often named as an early provider of package tours.

History of tourism distribution

In the first half of the 20th century, the sociological base of tourism demand widened from the very rich to the rich and, organised for instance by labour unions, in Europe and the USA also for workers.

Transport became easier and safer with the introduction of railways, coach buses and private cars. Flying was still only available for very rich persons.

Package tours lowered the cost of travel and triggered the construction of infrastructure specifically for leisure tourism like beach resorts and mountain hotels.

History of tourism distribution

Rise of Mass Tourism and Automation (1950s to 1980s)

Following World War II, mass tourism exploded due to increased leisure time, economic growth, beginnings of globalisation and affordable air travel.

Distribution channels evolved to include more structured intermediaries:

- Travel Agencies: Selling but not organising travel services through retail outlets (Highstreet shops)
- Tour Operators: Designing and selling package tours combining several services (transport, accommodation, tours, guides, meals etc.)

History of tourism distribution

- Computerized Reservation Systems (CRS): In the 1960s, airlines pioneered CRS, with Sabre in 1960 as the first major system. This allowed real-time inventory access for travel agents
- Global Distribution Systems (GDS): By the 1970s and 1980s, GDS like Amadeus, Galileo, Worldspan, and Abacus emerged. These networks connected airlines, hotels, and car rentals, enabling efficient bookings through travel agents.
- This period marked a shift from manual processes to automated systems, enhancing efficiency but increasing reliance on intermediaries.

History of tourism distribution

- Online Travel Agents (OTAs): The Internet Travel Network (ITN) launched in 1995 as the first OTA. In 1996, Sabre introduced Travelocity, Microsoft launched Expedia, and TravelWeb.com emerged as an early hotel booking portal. Priceline followed in 1998 with its name-your-price model for airline tickets.
- Search Engines: Automated search engines appeared in 1993, setting the stage for more advanced tools.

These changes empowered consumers with direct access, reducing the role of traditional agents while fostering new online intermediaries.

History of tourism distribution

2000s-2010s: Reintermediation and Digital Expansion

As the internet matured, new layers of intermediation (reintermediation) emerged, creating a more complex ecosystem:

- Meta-Search Engines: SideStep launched in 2000, followed by platforms like Google Flights, Skyscanner, Tripadvisor, and Trivago. These aggregated data from multiple sources, helping consumers compare deals but commoditizing hotel discovery.
- OTA Dominance: Companies like Booking.com (with over 28 million listings) and Expedia Group (operating 400+ sites) grew rapidly, capturing over 35% of global hotel bookings. Commissions rose, sometimes reaching 40% for hotels.

History of tourism distribution

- Peer-to-Peer Platforms: Disruptors like Airbnb (launched 2008, now with 6+ million listings) and Vrbo challenged traditional models, impacting hotel occupancy and rates
- GDS Evolution: Efforts to bypass traditional GDS included GDS New Entrants (GNEs) like Farelogix and ITA Software starting in 2005. Google's 2008 Chrome browser further influenced search dynamics.
- Social Media and User-Generated Content: Platforms began influencing bookings through reviews, influencers, and direct integrations.

Mobile devices amplified this, with apps enabling on-the-go bookings and suppliers developing direct platforms to reclaim control.

History of tourism distribution

2020s: Recent Trends

Today, distribution channels are highly digitized and fragmented, blending direct and indirect methods:

- Focus on Direct Bookings: Hotels and airlines prioritize their own websites and apps to avoid high OTA fees, using loyalty programs and personalized marketing.
- Technology Integration: AI, big data, and blockchain are emerging, enhancing personalization and efficiency.
- Challenges and Adaptations: Rising OTA and metasearch costs (driving 30%+ of traffic but <20% of bookings) push hotels toward diversified strategies, including partnerships and social media targeting.

Current situation

General trends:

- Travel Agencies are already disappearing fast and will not play a major role in the future except for specialised services
- Tour operators will follow within the decade to be superseded by AI-driven business models, again with the exception of special trips to places like Antarctica etc.
- GDS are already changing with previously important players close to bankruptcy

Current situation

The role of Online Travel Agencies (OTAs) is evolving from being primarily booking aggregators to becoming more integrated, personalized, and sustainable travel platforms, driven by AI, VR/AR, and changing consumer expectations for personalized experiences, environmental responsibility, and 24/7 convenience.

OTAs now focus on using data to offer custom recommendations, provide virtual exploration tools, and support sustainable travel choices, such as highlighting carbon footprints and eco-friendly lodging options.

New forms of distribution like B2C2C or B2B2C or even C2C are becoming more important, replacing timeshare or GroupOn etc.

Travel agencies and tour operators

- Travel Agencies: Selling but not organising travel services through retail outlets (high street shops)
- Tour Operators: Designing and selling package tours combining several services (transport, accommodation, tours, guides, meals etc.)

Tour operators build the trip, travel agents sell it

Travel agencies (B2B2C)

Travel agencies have undergone a significant transformation over the past few decades. Their evolution reflects broader technological changes, consumer behaviour and the global economy.

In the early days, travel agencies operated primarily from physical offices. They were the main point of contact for travellers looking to book train tickets, flights or hotel rooms. These agencies thrived because they held exclusive access to reservation systems and established relationships with service providers.

In an age without the internet, agents were seen as the encyclopaedias of travel. They provided invaluable advice, suggested itineraries and made complex international travel feasible. Their services were indispensable for both leisure and business travellers.

Travel agencies

With the rise of the internet, the late 1990s and early 2000s saw the emergence of online travel agencies (OTA) like Expedia. These platforms enabled travellers to directly book flights, hotels and other services online, challenging the monopoly of traditional agencies.

As information became readily available, the traveller became more empowered. While many embraced the DIY approach to travel planning, traditional agencies faced the pressure of adapting to the digital model or becoming obsolete.

Recognising the changing landscape, many travel agents shifted to home-based operations. This allowed them to cut costs, offer more personalised services and cater to niche markets, from luxury travel to eco-tourism or adventure sports.

Types of Travel agencies

In an age where everything is going digital, travel agencies remain a blend of both online and offline realms, catering to travellers' varied needs and preferences.

High street travel agencies

Retail travel agencies, traditionally known as high-street or brick-and-mortar agencies, have been the face of the travel industry for decades. You encounter these storefronts on bustling city streets, shopping centres or quaint town squares. They have witnessed the ebb and flow of the digital age but have managed to carve a niche for themselves amidst evolving times.

Travel agencies

Online travel agencies (OTAs) have transformed how people research, plan and book their trips. Seamlessly merging technology with travel, these platforms have capitalised on the digital era's opportunities, offering travellers unprecedented convenience and choice.

Benefits of OTAs:

Accessibility and convenience: Available 24/7, travellers can browse, compare and book their trips anytime, anywhere

Vast selection: With access to a wide array of airlines, hotels, car rentals and more, OTAs present a one-stop-shop for travel needs

Price comparisons: OTAs often aggregate data, allowing travellers to compare prices and options effortlessly, ensuring they get the best deal

Reviews and recommendations: Holidaymakers can benefit from reviews and ratings provided by fellow travellers, aiding informed decision-making

Travel agencies

Wholesale travel agencies (B2B)

While retail and online travel agencies often dominate the limelight, wholesale travel agencies operate behind the scenes, orchestrating a symphony of logistics, partnerships and packages. These B2B behemoths play a pivotal role in the travel industry, connecting vendors with retailers and ensuring that the end customer receives a well-structured, valuable experience.

Examples of these wholesale agents include TUI, which covers the entire tourism value chain, from travel agency to hotels and resorts to cruise lines.

Wholesale travel agencies are the backbone of the travel industry, ensuring a smooth supply chain, competitive prices and diverse offerings. Though less visible to the average traveller, their operations are integral to the functioning and sustainability of the tourism ecosystem.

Travel agencies

Business travel agencies

Business travel agencies specialise in a niche, ensuring that the unique needs of businesses and their travelling employees are met seamlessly. Their services are tailored to suit the fast-paced nature of corporate life and the unpredictability that often accompanies business trips.

Business travel agencies include American Express Global Business Travel, which offers end-to-end solutions for corporate travel. From advanced booking tools and traveller tracking to robust reporting and insights, they cater to businesses of all sizes. TravelBank is another example that merges technology with service, offering businesses tools for booking, managing expenses and tracking budgets.

Business travel agencies are the silent partners behind successful corporate trips. They bring a blend of expertise, technology, and service, ensuring that business travel, regardless of its inherent challenges, remains a smooth and efficient process for organisations and their employees.

Travel agencies

Leisure travel agencies

Leisure travel agencies are dedicated to sell holiday packages offered by tour operators.

Leisure travel agencies play an instrumental role in transforming holiday dreams into reality. Focusing on personalisation, attention to detail and expertise ensures that leisure tourists can immerse themselves in their holidays, leaving the logistics and planning in capable hands.

Travel agencies

Niche travel agencies

A way to survive as a travel agency in times of the internet and AI is to be a niche travel agency, specialist in catering to particular interests or demographics, crafting experiences. From ecotourism adventures in the Amazon to wellness retreats in Bali, these agencies delve deep into specific areas, ensuring authenticity and expertise.

In a world of diverse passions and interests, niche travel agencies have found their footing, dedicating themselves to cater to specific desires. By doing so, they don't just create trips – they offer experiences that resonate deeply with travellers, making every journey genuinely unforgettable.

Niche travel agencies often also act as tour operator for some tours

Online Travel Agencies

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Wonderful 9.0
54 reviews
1 night, 2 adults
~~US\$90~~ **US\$71**
Includes taxes and fees

Direct sales channels (B2C) Example airlines

The screenshot displays the China Southern Airlines website interface. At the top, the airline's logo and name are visible in both Chinese and English. Navigation links for 'English', 'Online customer service', and 'Login / Sign up' are present. A main navigation bar includes links for 'Home', 'Booking', 'Online Service', 'Sky Pearl Club', 'Travel Guide', and 'News&Notice'. The central booking section features a search form with 'From: Kathmandu (KTM)' selected. Below this, three destination options are listed: Xi'an, Guangzhou, and Wenzhou. Each option shows the fare class (Economy), trip type (Round Trip), and the starting price in NPR. A 'Book Now' button is located at the bottom of the search results. To the right of the search results, a promotional banner encourages users to 'Explore the history and culture of China' and provides a link to 'Search flights and book your trip'.

中国南方航空
CHINA SOUTHERN AIRLINES

English ▾ Online customer service Login / Sign up

Home Booking ▾ Online Service ▾ Sky Pearl Club ▾ Travel Guide ▾ News&Notice ▾

From: Kathmandu (KTM) ▾

Xi'an Economy Round Trip <u>From NPR 72940</u> *Round trip (tax included)	Guangzhou Economy Round Trip <u>From NPR 71240</u>	Wenzhou Economy Round Trip <u>From NPR 68732</u>
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Book Now

Explore the history and culture of China

Search flights and book your trip

Direct sales channels (B2C) Example hotels

The Soaltee
Hotels & Resorts

SOALTEE
Heritage Club
Bond Beyond Measure

Book Via **Soaltee Heritage Club** & Unlock Best deals!

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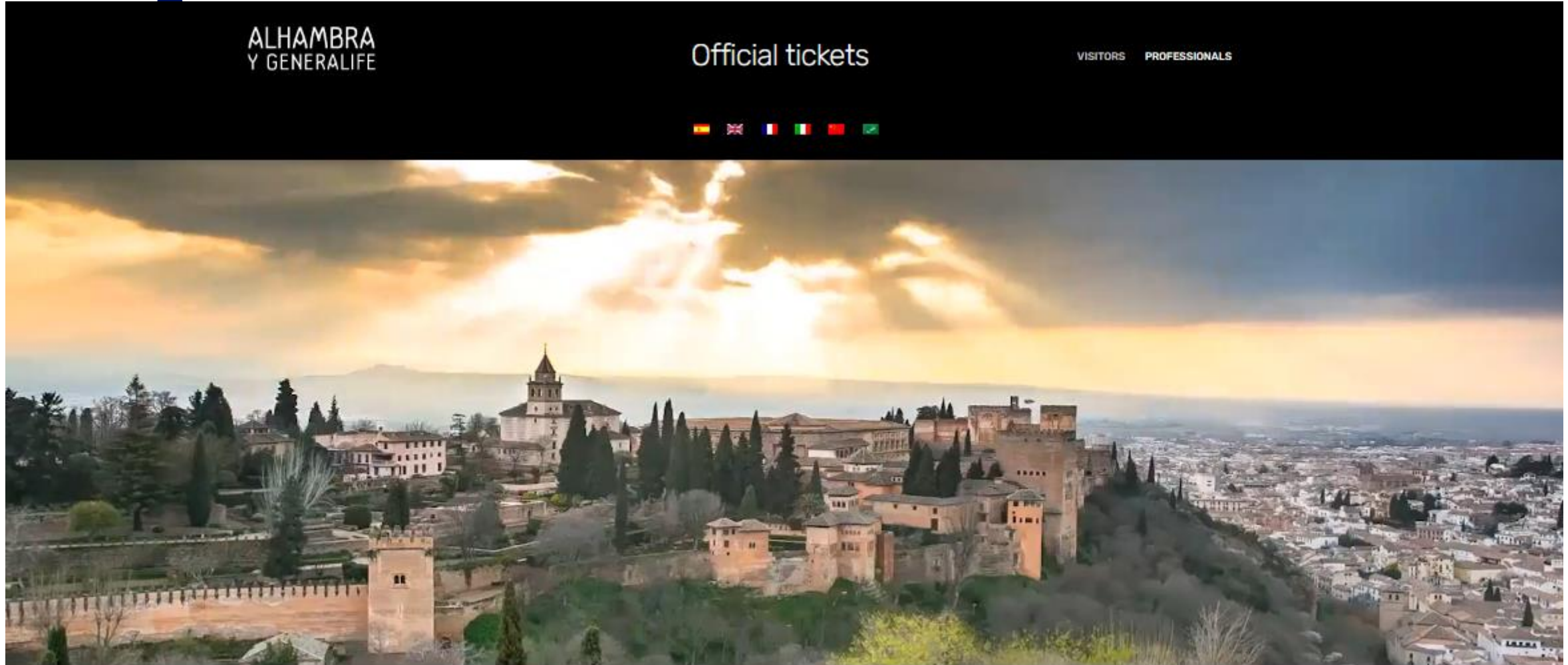
Tiger Palace By

CHOOSE YOUR HOTEL

Select Location

Direct sales channels (B2C)

Example Attraction



Partial closure of the Patio del Cuarto Dorado in the Nasrid Palaces

Direct sales channels (B2C)

Example Short-term rental



Homes

NEW
Experiences

NEW
Services

Become a host



Where
Search destinations

When
Add dates

Who
Add guests



Popular homes in Seoul >



Guest favorite

Room in 종로구

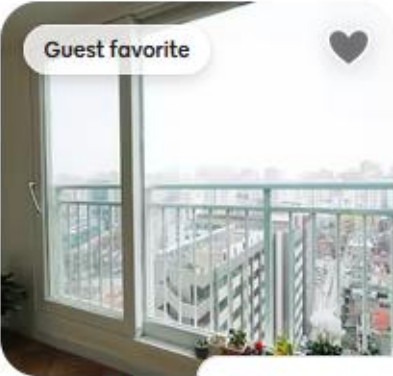
\$189 for 2 nights · ★ 4.95



Guest favorite

Guesthouse in Seoul

\$77 for 2 nights · ★ 4.93



Guest favorite

Room in Mapo-g

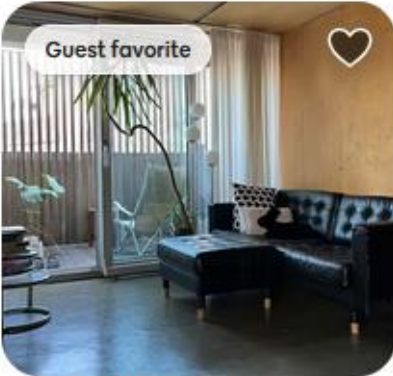
\$65 for 2 nights · ★ 4.92



Guest favorite

Room in Mapo-gu

\$114 for 2 nights · ★ 4.99



Guest favorite

Room in Seoul

\$52 for 2 nights · ★ 4.87



Prices include all fees

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Development of AI

Artificial Intelligence is already changing the way tourism is organised and how tourism products and services are distributed.

AI will destroy many traditional business models, travel agencies and tour operators will mostly disappear, as will tourism fairs.

Let's start by looking at the development of AI

Development of AI

Birth of AI (1950s-1960s)

- 1956: Dartmouth Conference - AI officially founded as an academic discipline
- 1957: Perceptron developed by Frank Rosenblatt (early neural network)
- 1958-1963: Early AI programs - checkers players, geometry theorem provers

First AI “Winter” (1970s)

- Limitations of early approaches became apparent
- 1969: Minsky & Papert's book shows limitations of perceptrons
- Reduced funding and interest due to unmet expectations
- Computational power and data insufficient for complex problems

Development of AI

Machine Learning Renaissance (1990s-2000s)

- Shift from knowledge-based to data-driven approaches
- 1997: IBM's Deep Blue defeats world chess champion Garry Kasparov
- Support Vector Machines, Random Forests, and other ML algorithms gain prominence
- Increased computational power and availability of data
- AI techniques integrated into practical applications (spam filters, recommendation systems)

Development of AI

Modern AI Era (2020s-Present)

- Large Language Models: GPT-3 (2020), ChatGPT (2022), GPT-4 (2023), GPT-5 (2025)
- Transformer architecture becomes dominant (introduced 2017)
- Multimodal AI systems (text, image, audio, video)
- Generative AI: DALL-E, Midjourney, Stable Diffusion
- AI integrated into consumer products and enterprise solutions
- Growing focus on AI safety, ethics, alignment, and regulation

AI and Tourism Distribution

- Current Applications of AI

Dynamic Pricing & Revenue Management

- AI algorithms optimize pricing in real-time based on demand, seasonality, and competitor rates
- Predictive analytics for occupancy forecasting and yield management

Personalized Recommendations

- Machine learning analyzes user behavior, preferences, and booking history
- Customized travel packages and destination suggestions

Chatbots & Virtual Assistants

- 24/7 customer service for bookings, inquiries, and support
- Natural language processing for multilingual communication

AI and Tourism Distribution

- Current Applications of AI

Search & Discovery Enhancement

- AI-powered search engines understand intent and context
- Visual search capabilities for destination inspiration

Distribution Channel Innovations

- Metasearch Optimization:

Direct Booking Enhancement

- AI-driven website personalization to reduce OTA dependency
- Predictive analytics to identify high-value direct bookers

Situation 2026 and beyond: New structures for information, decision-making and purchasing of tourism and hospitality services

AI and Tourism Distribution

- Emerging Trends

- Voice-Activated Booking
 - Integration with Alexa, Google Assistant, Siri, personalised travel assistants
 - Conversational AI for hands-free travel planning
- Predictive Travel Planning
 - AI anticipates travel needs before customers search
 - Proactive offers based on life events and patterns

AI and Tourism Distribution

- Future developments

- Hyper-Personalization
 - Personal assistants taking over planning and booking based on intimate knowledge of situation, preferences and experiences of traveller
 - AI creating unique experiences for individual travellers
 - Real-time adaptation during trips
- Autonomous Travel Agents
 - Surviving TAs offering end-to-end trip planning and management by AI
 - Proactive problem resolution during travel

AI and Tourism Distribution

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Why are Travel Agencies becoming obsolete? Economic Disruption: Cutting Out the Middleman

Benefits for the Traveler

- Dynamic Pricing: Access to real-time price fluctuations and deals.
- Cost Savings: Bypassing agency fees and commissions leads to significant savings.
- Direct Access: No more waiting for an agent to confirm details with a supplier.

Impact on the Industry

- Disintermediation: Airlines and hotels encourage direct bookings, weakening the role of intermediaries.
- Operational Efficiency: Suppliers reduce reliance on third-party channels, lowering their costs.
- Reduced Need for Agents: Automated systems handle the tasks once performed by human agents.

Why are Travel Agencies becoming obsolete? An Irreversible Digital Transformation

The convergence of these technologies is not a temporary trend but a fundamental and permanent rewiring of the entire travel ecosystem.

Consumer expectations have shifted towards instant, personalized, and cost-effective solutions. The traditional value proposition of a generalist travel agency has been eroded, possibly for good.

The Future of Travel Agencies

While the traditional model is obsolete, there is a path forward. Survival depends on evolution. Agencies can no longer compete on information or booking; they must compete on experience, specialization, and high-touch service that AI cannot replicate.

High-End Experience Curation

Niche Specialization (e.g., Adventure, Eco-Tourism)

Complex Multi-Destination Coordination

Human-Centric Problem Solving

AI and Tourism Distribution

Generative AI has upended just about every part of the travel lifecycle for both buyers and sellers of travel services. From the consumer perspective, the resources available to inspire, research, plan, book and share your favourite trips have simultaneously expanded the possibilities for consideration and curated that consideration set to a handful of suggestions — all in a matter of seconds.

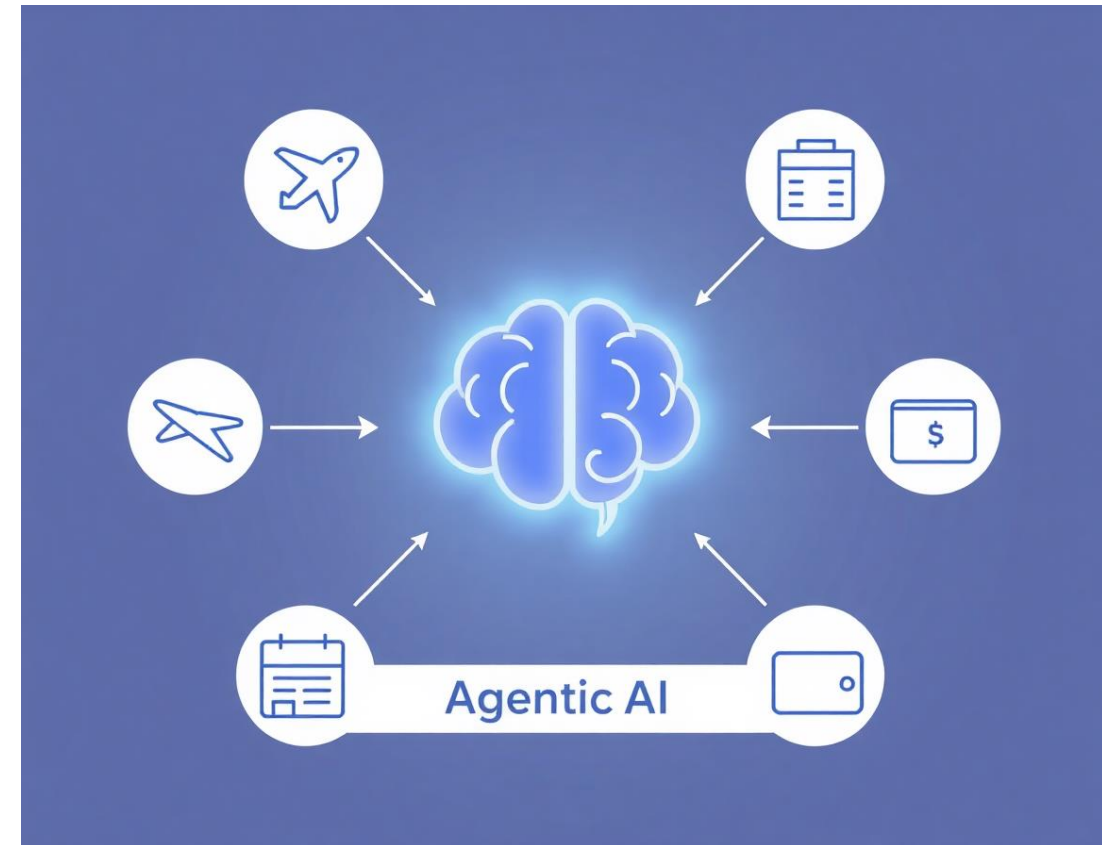
Moving from Generative to Agentic AI in tourism distribution

Understanding Agentic AI: A New Frontier

Agentic AI is a significant leap beyond traditional AI. Instead of just responding to prompts, AI Agents can proactively and autonomously take actions to achieve a complex goal. Think of it as a dedicated, intelligent digital assistant that can understand your intent, plan a multi-step strategy, and execute tasks across different platforms on your behalf.

The Analogy: A Super-Powered Travel Agent

Imagine a human travel agent who knows your preferences, monitors prices 24/7, understands complex visa requirements, and can book flights, hotels, and tours for you. Now, imagine this agent is digital, instantaneous, works for you alone, and can handle millions of data points per second. That is the promise of Agentic AI in tourism.



Agentic AI in Action: Personalized Travel Planning

Instead of a user searching for flights and hotels separately, they will simply state their goal to an AI agent: "Plan a 5-day relaxing beach trip to Southeast Asia for me and my partner next month, budget is \$3000, we love quiet beaches and good food." The agent will then autonomously:

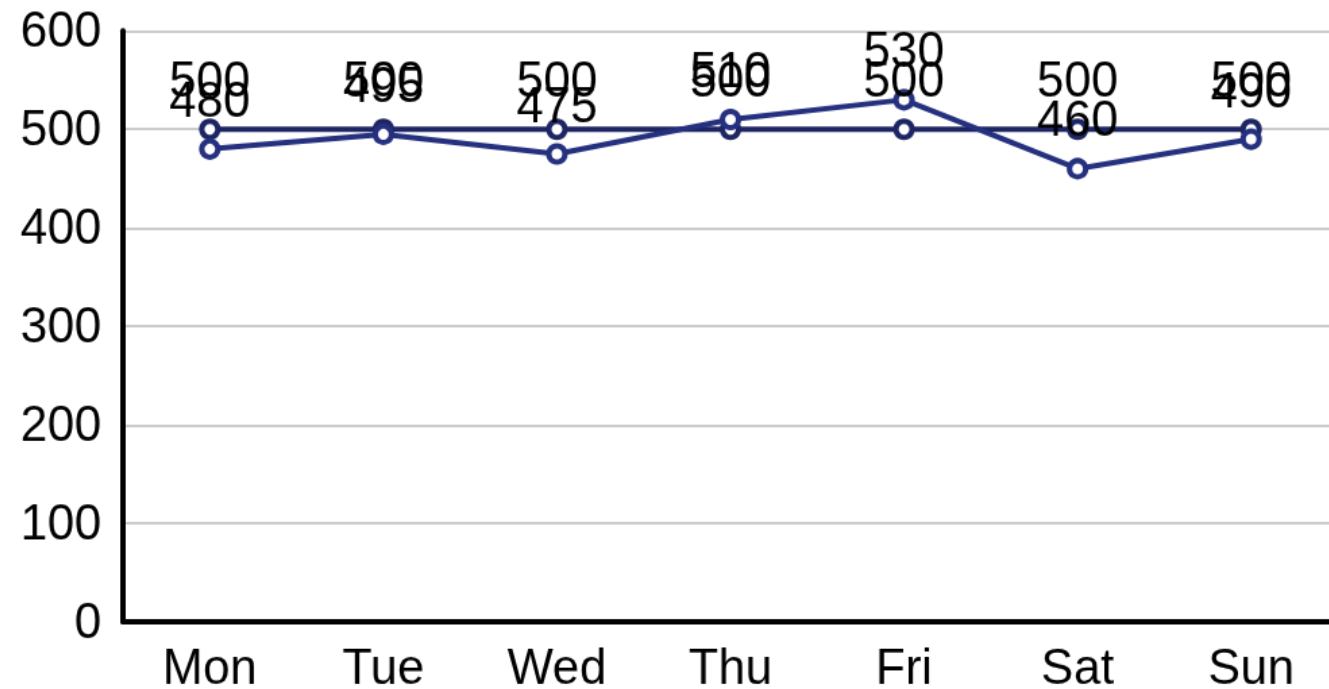
- Analyze user's past travel history and stated preferences.
- Research destinations that match 'quiet beaches' and 'good food'.
- Find the optimal combination of flights and accommodation within budget.
- Propose a complete itinerary, including restaurant suggestions and activities.
- Present the plan for one-click approval and booking.

Agentic AI in Action: Dynamic Pricing and Offers

Agentic AI will revolutionize pricing for both suppliers and consumers.

For suppliers, it means moving beyond simple demand-based pricing to true one-to-one dynamic pricing, offering a specific price to a specific user at a specific time to maximize the chance of conversion.

For consumers, their agent can negotiate in the background, hunting for price drops, finding exclusive package deals, or even using loyalty points in the most optimal way without manual intervention.



Agentic AI in Action: Real-time Customer Support

Customer support will shift from reactive to proactive. An AI agent monitoring a traveler's journey can detect disruptions before they become major problems.

Example Scenario: Flight Cancellation

If a flight is cancelled, the traveler's AI agent would instantly know. It would simultaneously check for alternative flights on multiple airlines, review the user's calendar for conflicts, and book the best option automatically, often before the traveler is even aware of the initial cancellation.

The Shift: From Traditional to AI-Powered Distribution

Traditional Channels

- Static & Manual: Relies on human input and fixed inventory.
- Siloed Information: Booking flights, hotels, and cars are separate tasks.
- One-to-Many: Generic offers and pricing for large audience segments.
- Reactive: User must search, compare, and book.
- Fragmented Experience: Multiple websites, apps, and logins.

AI-Powered Channels

- Dynamic & Autonomous: AI agents act independently to achieve goals.
- Integrated Ecosystem: Agents can interact with any service via APIs.
- One-to-One: Hyper-personalized journeys and pricing.
- Proactive: Agent anticipates needs and solves problems.
- Seamless Experience: A single conversational interface for all travel needs.

The New Distribution Ecosystem

Agentic AI will reshape the roles of existing players and create space for new ones.

1

Direct Booking Platforms

Hotel and airline websites will use AI to provide OTA-like personalization, offering unique packages and dynamic pricing to lure customers away from intermediaries.

2

OTAs & Meta-Search Engines

Platforms like Expedia and Kayak will integrate agentic capabilities, evolving from search portals into comprehensive AI travel managers.

3

Emerging AI-Native Platforms

New startups will be built from the ground up on an agentic AI framework, offering subscription-based personal travel agents and potentially disrupting the entire market.

New Business Models Driven by Agentic AI

Travel-as-a-Service (TaaS)

Subscription models where users pay a monthly fee for a dedicated AI travel agent that manages all their personal and business travel.

Hyper-Personalized Ancillary Revenue

AI agents suggesting and booking highly relevant add-ons (e.g., a specific museum ticket based on browsing history) at the perfect moment.

Inter-modal Autonomous Booking

A single agent booking a seamless journey involving a flight, a ride-share from the airport, and a scooter rental at the destination, all in one transaction.

Example SEO to GEO

Hotels spent a lot of time and money to reach high Google rankings through SEO Search Engine Optimisation.

With AI this is changing to GEO Generative Engine Optimization.

However, a traveler who lands on a hotel site from an AI recommendation will still open Trivago etc to look for a better offer. The AI got them to the door.

The website still has to close: Best price guarantees. Loyalty incentives. Real-time OTA price comparison on the hotel website. Without these, the guest is lost at the last meter.

Example SEO to GEO

Problem:

Chain hotels have the brand, the budget, and the tech teams to invest in GEO and conversion infrastructure. Independent hotels, the ones that need direct bookings the most, are already behind in a game they don't know exists.

AI just created the first real shortcut past OTAs in 20 years.

The hotels that move now won't just save on commissions.
They'll own the conversation before the guest even opens a browser.

Example Destination Marketing

AI is reshaping the foundations of destination marketing.

Moving beyond promotional tools and smart technologies, AI increasingly designs destination experiences by shaping what tourists see, plan, and experience before and during travel.

By influencing discovery, sequencing, and in-destination navigation, AI shifts Destination marketing from influencing choice to orchestrating experience paths. What is needed is a conceptual reframing of destination marketing as experience orchestration of tourist meaning-making, authenticity, and governance in the age of algorithms

Conclusion

Skills needed for future Tourism Distribution

For professionals and businesses in the tourism sector, adaptation is not optional. The focus must shift from manual execution to strategic oversight of AI-driven systems.

Key Skills for the New Era:

- Data Literacy: Understanding and interpreting AI-generated insights.
- AI System Management: Configuring, training, and overseeing AI agents.
- Customer Experience (CX) Design: Crafting the human-AI interaction journey.
- Ethical Oversight: Ensuring AI systems are fair, transparent, and secure.
- Prompt Engineering: Skillfully instructing AI agents to achieve desired outcomes.

Thank you for your attention! Any questions?



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