



European Institute of Innovation,
Entrepreneurship, and Technology

Title: Evolving Role of Online Travel Agencies Amid the Rise of Direct Bookings

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Submission date: 24.10.2025

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Abstract

Online Travel Agencies (OTAs) have shaped the global tourism landscape for more than two decades by transforming how travelers search, compare, and book experiences. Yet, the growth of direct booking—driven by personalization, technology, and consumer trust in brand channels—has triggered a significant reconfiguration of travel distribution.

This research critically explores how OTAs are redefining themselves in this changing environment. It examines direct booking trends, evaluates OTA strategies, and interprets the human dimensions of trust and emotional engagement in travel technology. The study draws from scholarly literature, industry reports, and recent case studies, including Booking.com, Expedia, Airbnb, and emerging players like TikTok Travel and Trip.com.

The paper argues that OTAs are not disappearing but evolving—from intermediaries to integrated experience ecosystems. Their future depends on empathy, ethical innovation, and collaboration in a digitally saturated yet emotionally hungry world.

1. Introduction

When I first booked a trip online as a student, I didn't really think about the platform behind the payment gateway or the entity confirming the flight—it was all about convenience. It was 2016, a time when dominant online travel agencies like Booking.com and MakeMyTrip were shaping travel planning as a matter of a few clicks. Since then, however, the digital travel landscape has shifted dramatically, shaping new expectations and behaviors.

Today, the modus operandi of travel booking is no longer purely intermediated by OTAs. Hotels, airlines, and even social-media influencers are increasingly inviting travellers to “book directly.” I regularly encounter Instagram travel ads with “Book Now” buttons, personalised hotel website offers, and AI-powered chatbots suggesting itineraries on my phone. This mirrors broader industry signals of what has been called “partial intermediation,” where consumers may research

on platforms but complete bookings elsewhere. While the convenience and comfort of using an OTA still exist, the landscape is no longer as singular or insulated as it once felt.

The change unfolding isn't merely technological—it is deeply emotional, behavioural, and value-driven. Travellers today crave authenticity, transparency, and human connection—not just the lowest fare or fastest transaction. As scholars such as Ulrike Gretzel and Marianna Sigala observe, digital transformation in tourism extends beyond efficiency into realms of trust and personalization. In this new context, OTAs face a dual challenge: to maintain the technological infrastructure of ease and scale, and simultaneously to foster human-centric experiences that meet travellers' evolving aspirations.

In this research paper I examine the evolving role of online travel agencies in an era increasingly defined by direct booking channels. I explore how these digital intermediaries are not just adjusting their service models but are being asked to reinvent their very purpose. What structural shifts are enabling the move toward direct booking? How are OTAs adapting to preserve relevance and value? And ultimately, what shape does travel intermediation take when empathy, emotion and ethics become as central as efficiency and inventory?

This analysis will begin by probing the structural and behavioural forces driving the rise of direct booking—from technological enablers like mobile-first interfaces and real-time data to evolving consumer attitudes around control, trust and connection. Following that, I will evaluate how OTAs are adapting their models: shifting from pure distribution to curated experience, from volume to value, from price-based competition to relationship-based relevance. Finally, I will look ahead: what might the future of travel intermediation look like in a digital age where emotional intelligence and ethical alignment may determine not only who wins—but who matters.

Through these lenses, this study does not merely map market dynamics; it seeks to humanise them. Because behind every “book now” click is a human being with hopes, desires and stories. And at a moment when the industry is transforming, the winners may be those who recognise that the click is not the end—rather, the beginning of an exploration.

2. Literature Review

2.1 The Evolution of OTAs

Online Travel Agencies emerged in the late 1990s as the Internet began reshaping business ecosystems. Expedia (founded in 1996) and Booking.com (1997) pioneered online booking convenience by digitizing travel agencies' traditional roles (Werthner & Ricci, 2020).

The first phase of OTAs (1995–2005) was defined by *digital efficiency*: inventory management, price comparison, and transaction security. The second phase (2005–2020) shifted toward *consumer empowerment*, driven by reviews, bundling, and loyalty programs (Buhalis & Licata, 2022).

But the third phase (2020 onward) is about *reintermediation*. Direct booking platforms and super-apps like Google Travel and Trip.com are reclaiming customer journeys. OTAs must therefore reposition themselves—not just as sellers but as **experience architects** (Buhalis, 2023).

2.2 Direct Booking as Digital Empowerment

Direct booking emerged as a resistance to OTA dependency. Hotels and airlines wanted independence from high commissions and better access to customer data. Hilton’s “Stop Clicking Around” campaign in 2016 exemplified this strategic movement, emphasizing loyalty rewards for direct bookers (O’Connor, 2021).

Post-pandemic, travelers also favored direct relationships for **trust and flexibility**—something OTAs struggled to deliver during refund disputes (Gretzel et al., 2021). In 2024, direct channels accounted for 53% of global online travel sales (Phocuswright, 2024).

Direct booking, therefore, isn’t merely a cost strategy; it’s a reassertion of relational power. It’s about **control, transparency, and connection**—values central to modern digital consumers.

2.3 OTA Strategies for Reinvention

OTAs are not passive in this transition. They have embraced AI, data analytics, and personalization to enhance value. Expedia’s partnership with Microsoft’s AI Copilot and Booking.com’s “Connected Trip” ecosystem are examples of integrated innovation (Expedia Group, 2024).

Moreover, OTAs are diversifying into **experience economy segments**—activities, dining, insurance, and even sustainability labeling. Airbnb’s “Experiences” model shifted the focus from booking rooms to living stories (Sigala, 2021).

Another adaptation is **subscription and loyalty ecosystems**—for instance, eDreams Odigeo’s “Prime” membership model or Expedia’s “One Key” reward system—allowing retention through convenience and cumulative benefits.

2.4 Technology and Trust

While AI-driven personalization enhances efficiency, it raises ethical concerns. Algorithmic bias and data privacy risks can damage consumer confidence (Buhalis & Sinarta, 2019).

At the same time, trust remains a fragile currency. A Deloitte (2024) survey found that 72% of travelers prioritize transparent communication and human support over automated systems. This suggests that OTAs must balance **technological precision with emotional intelligence**—a core challenge of digital hospitality.

2.5 Future Frameworks

The literature converges on one insight: the OTA of the future will not be a transactional platform but an **ecosystem of trust, personalization, and purpose**. Success will depend on adaptive collaboration, sustainability integration, and ethical leadership (Sigala, 2021; Buhalis, 2023).

3. Methodology

This research employs a qualitative, interpretive methodology that emphasizes the subjective and contextual dimensions of online travel agency (OTA) transformation, prioritizing conceptual depth over statistical generalization (Denzin & Lincoln, 2018; Creswell & Poth, 2020). By focusing on meaning-making and interpretation rather than numerical precision, this approach captures the nuanced interplay between technology, market forces, and human experience within digital travel ecosystems (Saunders, Lewis & Thornhill, 2019; Flick, 2018). The interpretive stance acknowledges that OTAs operate not only as commercial intermediaries but also as cultural and technological artifacts that shape consumer perceptions, trust, and decision-making (Gretzel, 2021; Buhalis & Sinarta, 2019). Consequently, the study's qualitative design enables a richer and more human-centered exploration of the changing dynamics of the travel marketplace in the post-pandemic digital era (Sigala, 2020; Kock, Nørfelt & Josiassen, 2021).

The research design draws upon secondary data sources from 2020 to 2024, integrating academic studies, industry analyses, and corporate financial disclosures to construct a holistic picture of OTA evolution (Yin, 2018; Saunders et al., 2019). Data were collected from authoritative publications such as *Phocuswright*, *Skift Research*, *Deloitte Insights*, and peer-reviewed academic journals available through Taylor & Francis and Emerald databases (Gursoy & Chi, 2020; Gössling, Scott & Hall, 2021). This triangulation of sources strengthens the validity of interpretations by balancing theoretical insight with market realities (Patton, 2015; Tracy, 2020). The decision to employ secondary data acknowledges the dynamic, data-rich environment in which OTAs operate and allows for an interpretive reading of how industry discourse, financial strategies, and consumer behaviors converge in shaping OTA transformation (Gretzel, Werthner & Koo, 2015; Xiang, 2022).

Case selection was strategically designed to capture geographic, operational, and strategic diversity among OTAs (Eisenhardt, 1989; Stake, 1995). The inclusion of Booking Holdings, Expedia Group, Airbnb, Trip.com, and Yatra enables the exploration of both mature and emerging market dynamics (Sigala & Gretzel, 2018; Li, Pearce & Low, 2021). Furthermore, the examination of emerging competitors such as TikTok Travel and Google Travel offers insight into how external digital ecosystems influence the reintermediation of travel services (Liu, 2023; Xiang, Tussyadiah & Buhalis, 2021). This diversity provides a comparative understanding of how different institutional logics, technological architectures, and cultural contexts shape strategic evolution in the travel industry (Richards, 2020; Jovicic, 2019). The case study framework, therefore, functions as a lens for understanding both convergence and divergence in OTA transformation trajectories (Flyvbjerg, 2006; Yin, 2018).

Thematic analysis was applied to synthesize recurring patterns and meanings across the data corpus (Braun & Clarke, 2006; Nowell et al., 2017). Five core themes—market and behavioral shifts, technological adaptation, consumer trust and ethics, competitive reintermediation, and future positioning—were inductively coded to reveal the interconnected narratives shaping OTA futures (Sigala, 2020; Gretzel, 2021). This interpretive coding process foregrounds the human and ethical dimensions of technological change, emphasizing not only what OTAs do but how they are perceived and trusted by global travelers (Buhalis & Leung, 2018; Kim, Kim & Wang, 2022). The analytical approach aligns with interpretivist traditions that value contextual richness, researcher reflexivity, and narrative coherence in understanding complex digital phenomena (Tracy, 2020; Denzin, 2017). Ultimately, this methodology seeks to capture the lived, evolving reality of digital intermediation—where algorithms, consumers, and corporations continuously redefine the contours of travel.

4. Findings

4.1 The Market in Transition

The OTA industry remains economically significant yet vulnerable. Booking Holdings reported record revenues of USD 21 billion in 2023, but its profit margins have stagnated due to marketing dependency and rising ad costs on Google (Statista, 2024).

Simultaneously, direct booking platforms experienced double-digit growth. Marriott and Hilton each reported over 25% growth in direct digital sales between 2022 and 2024 (Skift Research, 2024).

Consumer behavior has become **hybrid**—travelers research on OTAs but often finalize bookings directly. This behavioral elasticity underscores OTAs' continuing role in *discovery*, even if not in *transaction*.

4.2 Case Study Insights

Case 1: Booking.com – The Connected Trip Vision

Booking.com envisions an ecosystem where travelers can book every aspect of their trip—flights, stays, attractions, and mobility—in one seamless interface. Its “Travel Sustainable” program also aligns with environmental transparency goals (Booking Holdings, 2024).

Case 2: Expedia Group – AI and Consolidation

Expedia merged its multiple brands under a single loyalty program (“One Key”) and introduced AI-powered personalization tools. By automating support and pricing prediction, Expedia aims to cut operational costs while improving experience quality.

Case 3: Airbnb – Emotionally Driven Intermediation

Airbnb disrupted the OTA model by emphasizing human connection. Instead of hotels, it offers

“belonging.” During the pandemic, its community-driven narrative strengthened consumer trust—a lesson traditional OTAs can learn from (Sigala, 2021).

Case 4: Trip.com – Localization and Payment Integration

Trip.com dominates the Asia-Pacific market through localized language support, flexible payments (Alipay, WeChat Pay), and dynamic pricing tools. This adaptability shows how cultural alignment drives digital success (Trip.com, 2024).

Case 5: Yatra – India’s Budget Resilience

Yatra thrives in price-sensitive markets through vernacular accessibility, budget bundling, and trust-based refund policies. Its growth reflects the power of regional relevance over global dominance.

4.3 External Disruptors: Google and TikTok

Google Travel represents the most existential threat to OTAs. Its integration of flight and hotel search into general Google results pushes OTAs lower in visibility, forcing them to pay for placement (Xiang et al., 2023).

Meanwhile, **TikTok Travel** introduces influencer-driven bookings through storytelling—a phenomenon blending emotion and commerce. By merging inspiration with transaction, TikTok erodes OTA monopoly over travel discovery (Deloitte, 2024).

4.4 Trust, Sustainability, and Ethics

Modern consumers demand responsible intermediation. OTAs that provide verified sustainability data, fair refund policies, and transparent pricing earn loyalty. Booking.com’s sustainability badges and Trip.com’s green initiatives mark progress, but industry-wide accountability remains inconsistent (Buhalis, 2023).

5. Discussion

The evolution of online travel agencies (OTAs) from traditional intermediaries to integrated ecosystem orchestrators reflects a profound transformation in how value is created and experienced in global travel networks (Buhalis, 2023; Xiang, 2022; Sigala & Gretzel, 2018). Historically, OTAs operated as digital middlemen, facilitating transactions between suppliers and consumers (Werthner & Ricci, 2004; Law, Leung & Buhalis, 2015). However, in an increasingly interconnected digital economy, this linear model is giving way to a circular, data-driven ecosystem that thrives on interdependence, collaboration, and mutual benefit (Gretzel, 2021; Buhalis & Leung, 2018). The shift from “marketplace” to “mobility ecosystem” redefines OTAs not as passive brokers but as active ecosystem coordinators who align airlines, hotels, and tourism boards through real-time data sharing and value co-creation (Buhalis, 2023; Li, Pearce & Low, 2021). This ecosystemic model mirrors the “smart tourism” paradigm, where intelligence

and interoperability are central to delivering seamless and personalized traveler experiences (Gretzel, Sigala, Xiang & Koo, 2015; Del Vecchio & Passiante, 2020).

At the heart of this transformation lies the human factor—the essential reminder that technology, however advanced, cannot replace empathy, trust, and emotional connection (Sigala, 2021; Kim, Kim & Wang, 2022). Travelers increasingly seek reassurance and understanding, particularly in a post-pandemic world marked by uncertainty and heightened emotional needs (Gössling, Scott & Hall, 2021; Kock, Nørfelt & Josiassen, 2021). While artificial intelligence can predict preferences, only human-centered design can make users feel genuinely cared for (Tracy, 2020; Denzin, 2017). The integration of “empathetic AI” in travel platforms—systems that adapt tone, transparency, and interaction style—marks the next phase of humanized automation (Sigala, 2021; Buhalis, 2023). An OTA that remembers a traveler’s quiet preferences, accessibility needs, or emotional triggers transcends transactional engagement, cultivating relational loyalty grounded in care and memory (Tussyadiah, 2020; Xiang, 2022). Such personalization rooted in empathy not only improves satisfaction but also builds ethical trust, transforming customer experience into a co-created emotional journey (Gretzel, 2021; Buhalis & Sinarta, 2019).

As competition intensifies, OTAs are increasingly embracing “coopetition”—a hybrid strategy combining cooperation and competition—to navigate complex market dynamics (Bengtsson & Kock, 2014; Phocuswright, 2024). In this reintermediation era, OTAs collaborate with rivals and complementary platforms to leverage shared technologies and data ecosystems (Sigala & Gretzel, 2018; Buhalis, 2023). Expedia’s partnership with Hopper to utilize price prediction algorithms exemplifies this adaptive logic of mutual gain through technological collaboration (Phocuswright, 2024; Deloitte Insights, 2023). Similarly, Booking.com’s collaboration with regional destination management organizations (DMOs) demonstrates how coopetition fosters destination-level sustainability and competitiveness (Gretzel, 2021; Li et al., 2021). This strategic interdependence reflects a paradigm shift from market domination to network symbiosis, allowing OTAs to remain agile, resilient, and innovative in an increasingly platformized digital economy (Sigala, 2020; Xiang & Tussyadiah, 2021).

The ethical and sustainable dimensions of OTA transformation represent another critical frontier in this evolving landscape (Buhalis, 2023; Gössling, Scott & Hall, 2021). As global awareness of climate change and social justice deepens, consumers are demanding transparent, responsible, and inclusive travel options (Font, Higham & Miller, 2019; Jovicic, 2019). OTAs can no longer be passive distributors of travel inventory; they must act as ethical mediators who curate sustainable mobility choices and verify eco-claims (Buhalis, 2023; Xiang, 2022). Blockchain technology, for instance, can enhance traceability and accountability in carbon offset programs, ensuring credibility in sustainability narratives (Gretzel, 2021; Del Chiappa & Baggio, 2015). Furthermore, OTAs can leverage their platforms to promote local community inclusion, equitable labor practices, and low-carbon transportation, positioning themselves as moral actors in the tourism value chain (Sigala, 2021; Kim et al., 2022). This ethical repositioning not only strengthens brand legitimacy but also aligns OTAs with the global call for regenerative and socially responsible tourism (Gössling, Scott & Hall, 2021; Richards, 2020).

Innovation, therefore, becomes the lifeblood of OTA reinvention, driven by both technological sophistication and human aspiration (Li et al., 2021; Buhalis, 2023). Hyper-personalization,

powered by predictive analytics and AI, must evolve from a commercial tool into an emotional interface that genuinely understands user intent and context (Sigala, 2021; Gretzel, 2021). Collaborative loyalty schemes that integrate airlines, hotels, and local experiences can foster a sense of belonging and reward that transcends brand silos (Phocuswright, 2024; Deloitte Insights, 2023). Likewise, community curation—where travelers contribute authentic reviews, local tips, and cultural narratives—redefines engagement as co-creation rather than consumption (Tussyadiah, 2020; Xiang, 2022). By merging ethical storytelling with immersive technologies such as augmented and virtual reality, OTAs can transform the booking process into a participatory, emotionally resonant experience (Gretzel & Sigala, 2020; Li et al., 2021).

Ultimately, this discussion underscores that the future of OTAs is not merely digital but profoundly human (Buhalis, 2023; Sigala, 2021; Xiang, 2022). As algorithms and automation redefine operational efficiency, the emotional dimension of travel remains irreplaceable—a reminder that journeys are as much about human connection as they are about logistics (Gössling, 2021; Gretzel, 2021). The convergence of data-driven intelligence with ethical design principles creates a balanced pathway toward sustainable innovation (Tracy, 2020; Denzin, 2017). The challenge for OTAs lies in preserving empathy within efficiency, fostering inclusivity within innovation, and maintaining authenticity within automation (Sigala & Gretzel, 2018; Buhalis & Sinarta, 2019). In this sense, digital transformation becomes not an endpoint but an evolving dialogue between technology, humanity, and the collective imagination of global travelers (Buhalis, 2023; Xiang & Tussyadiah, 2021).

In conclusion, the discussion reflects that OTAs are standing at the crossroads of transformation, where human empathy, ethical practice, and digital intelligence must converge to redefine the future of global mobility (Buhalis, 2023; Sigala, 2021; Gretzel, 2021). The path forward demands courage to innovate responsibly, collaborate meaningfully, and narrate authentically in a hyperconnected yet fragmented world (Font et al., 2019; Kock et al., 2021). The evolution from intermediaries to ecosystems, from automation to empathy, and from competition to collaboration marks a defining shift in the essence of travel mediation (Phocuswright, 2024; Li et al., 2021). As the boundaries between technology and humanity blur, the success of OTAs will depend on their ability to humanize digital intelligence and uphold values that resonate with the travelers of tomorrow (Buhalis & Leung, 2018; Gretzel, 2021). Through such an integrated and humanistic approach, OTAs can not only survive but lead in shaping the next era of ethical, connected, and emotionally intelligent tourism (Sigala, 2021; Buhalis, 2023; Xiang, 2022).

6. Conclusion

The world of travel distribution is shifting beneath the feet of even the largest online platforms, yet the future of the online-travel agency (OTA) is not written in disappearing ink—it is a call to evolve. As direct bookings, peer-to-peer platforms, and decentralized models gain traction, OTAs face their greatest test of relevance. The numbers underscore it: according to one market-report, the global OTA market was projected to grow at a compound annual growth rate (CAGR) of 10.11 % between 2025 and 2034. But beyond growth lies the question: growth of **what**, and for **whom**?

OTAs have long competed on the twin levers of price and inventory: the lowest fare, the widest selection, the fastest booking. That formula succeeded for a time, but it is weakening. Travellers no longer simply want a booking; they want an experience. Research among younger consumers found that perceived trust and value influence their intention to use OTAs far more than mere price. In other words: behind every click sits a person, with a story, with hopes, and intentions. The OTA of the future can't ignore that.

To claim its place in tomorrow's distribution framework, the OTA must pivot from transaction to transformation. It must become a curator of meaningful journeys rather than a dispenser of inventory. Personalisation, yes—but personalisation that feels warm, not mechanical. Analytics, yes—but used for insight not intrusion. Technology, yes—but applied in ways that amplify human connection rather than reduce it. It's not enough to forecast “which flight they'll pick”; the question must become “which moment they will remember.” Some research on travel-recommender systems underscores that context matters: predictions must adapt to who the traveller is *in that moment*, not just what they have done in the past.

Trust and empathy will emerge as key differentiators. In a digital world awash with noise, travellers turn increasingly to platforms they feel understand them, protect them, and guide them. The OTA ecosystem has matured, and with maturity comes scrutiny: issues around data-privacy, algorithmic opacity, high commissions and hotel dependency have emerged. For example, one study of OTAs' impact on hotel revenues noted that while OTAs boost visibility, they also impose high commission rates and limit hotels' direct relationships with guests. OTAs that ignore this broader ethical dimension risk being perceived as extractive, rather than helpful.

Thus, the OTA must marry efficiency with humanity. Automation will always matter—mobile-first booking flows, real-time inventory, AI-backed suggestions—but without authenticity they will feel hollow. When a traveller books a trip, they are not just buying a seat or a room; they are buying hope, escape, transformation. The platforms that win will understand that behind “book now” lies “I will feel something when I arrive.” They will design not only for clicks, but for feeling.

Moreover, the next era of distribution will reward the ethically intelligent, not just the technologically advanced. Sustainability filters, transparent data-practices, local-community sensitive experiences, and travel that honours place and people will gain prominence. Market trends already indicate that OTAs integrating eco-friendly options and dynamic packaging are increasing user engagement significantly—one report noted a 46 % adoption of AR previews, 38 % adoption of sustainability filters, and a 43 % improvement in conversion through AI-driven personalisation. OTAs that simply push lowest price deals will struggle to differentiate when consumers ask: “Is this right for me? Is this good for the world?”

And here's the heart of it: OTAs don't just distribute travel—they unlock dreams. Every itinerary is a promise of transformation, every booking a commitment to memory. Platforms that recognise and honour that will stand out. At its best, the OTA becomes a companion, not a catalogue; a voice that says, “We understand your longing”—not simply, “Here are your options.”

So yes: the OTA model is under pressure from disintermediation, from peer-to-peer platforms, from empowered travellers. But decline is not inevitable. What is inevitable is change. The platforms that rise will be those that embrace transformation, that shift from “more travel sold” to “more travel felt,” from “booking done” to “journey begun.” Their armor will not solely be algorithms, but emotional intelligence.

In the end, the next era of travel distribution belongs not to the fastest or cheapest, but to the most emotionally intelligent. The OTA of tomorrow will blend data with compassion, optimisation with warmth, technology with humanity. For behind every screen, behind every itinerary, there is a person longing to explore, to connect, to feel alive. And the platform that meets that longing with empathy will not merely survive—it will lead.

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