



European Institute of Innovation,
Entrepreneurship, and Technology

**Title: *The Transformation of Online Travel
Agencies in the Digital Direct Booking Era***

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Submission date: 24.10.2025

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Abstract

The tourism industry stands at the heart of a profound digital transformation—one that has redefined how people dream, plan, and experience travel. Online Travel Agencies (OTAs) such as **Booking.com**, **Expedia**, and **Agoda** once acted as indispensable mediators connecting travelers to accommodation, transport, and local experiences (Buhalis & Law, 2021). Their emergence revolutionized convenience and price transparency, creating a one-stop ecosystem that democratized global travel. Yet, the surge of **direct booking channels**, coupled with **data-driven personalization** and **social media influence**, is now unsettling this once-stable intermediary model (Dolnicar, 2023).

Today's travelers, particularly **Millennials and Gen Z**, exhibit an increasingly self-reliant approach to trip planning. Armed with information, they navigate platforms directly, often motivated by loyalty programs, real-time discounts, and the authenticity promised by direct engagement (Sigala, 2021). As brands such as **Marriott** and **Hilton** invest in robust digital ecosystems and mobile-first apps, the dependency on OTAs has diminished, shifting control over customer data and loyalty away from intermediaries (O'Connor, 2021). This paradigm shift challenges OTAs to move beyond transactional facilitation toward **experiential relevance**—a transformation that demands innovation rooted in human insight and emotional connection.

In response, OTAs are undergoing a period of strategic reinvention. Emerging technologies such as **artificial intelligence (AI)** and **machine learning** are enabling them to predict traveler intent, tailor recommendations, and provide real-time support through intelligent chatbots like **Expedia GPT** (Buhalis, 2023). Similarly, the adoption of **blockchain** enhances trust by securing transparent reviews and verifiable transactions (Koo, Cobanoglu & Della Corte, 2022). Yet, these advances risk producing uniformity—where every interface begins to feel algorithmically identical. Hence, the differentiator for tomorrow's OTAs will be **empathy in design** and **human authenticity** within digital interactions.

Beyond technological agility, the competitive edge of OTAs increasingly depends on **ethical integrity** and **sustainable transparency**. Modern consumers seek purpose-driven brands that align with values of inclusivity, carbon accountability, and local community engagement

(Gretzel, Sigala & Xiang, 2021). To thrive, OTAs must evolve into **responsible intermediaries**, highlighting verified green accommodations and ensuring ethical data practices that honor consumer privacy. This moral repositioning does not merely fulfill regulatory demands—it nurtures trust, which remains the ultimate currency in digital hospitality ecosystems (Xiang, 2023).

Ultimately, the survival of OTAs lies not in resisting direct bookings but in reimagining their role within a connected, ethical, and personalized travel landscape. The future of intermediation will belong to those platforms capable of integrating **technology with empathy, efficiency with ethics, and data with trust** (Buhalis & Volchek, 2023). As the boundaries between traveler, supplier, and intermediary blur, OTAs are no longer just booking platforms—they are becoming **curators of meaningful journeys**, where innovation meets the human desire for connection, belonging, and authentic exploration.

1. Introduction

The global tourism industry has long depended on intermediaries to connect travelers with service providers, serving as the connective tissue of global mobility and cultural exchange. Before the digital revolution, brick-and-mortar travel agencies held the power to shape itineraries and control access to flight and hotel inventories (Buhalis & Law, 2021). The arrival of the Internet in the 1990s, however, transformed this landscape irrevocably. **Online Travel Agencies (OTAs)** such as **Expedia, Booking.com, and Agoda** emerged as technological disruptors, providing real-time access to accommodation, transport, and destination experiences (Werthner & Ricci, 2020). This marked the dawn of digital intermediation—a shift that democratized travel planning by empowering consumers with information transparency, dynamic pricing, and peer-generated reviews. The act of travel planning, once a domain of professional agents, became an intimate and self-directed digital ritual.

However, the balance of digital power began to tilt again in the late 2010s. The accelerating advancement of **information technology, artificial intelligence, and data analytics** gave rise to an alternative paradigm: **direct booking**. Hotels, airlines, and tour operators increasingly bypassed OTAs by leveraging their own digital infrastructures—brand websites, loyalty apps, and social media engagement—to establish direct, emotionally resonant relationships with customers (O'Connor, 2021). Direct booking offered two immediate advantages: first, the elimination of hefty OTA commission fees that could reach 15–25% per booking (Phocuswright, 2022), and second, ownership of **first-party customer data**, which became a goldmine for personalized marketing and loyalty reinforcement (Xiang, 2023). This data-centric autonomy redefined how suppliers viewed customer relationships, reframing the OTA not as a partner but as a potential competitor.

The shift toward direct booking reflects more than an economic adjustment—it embodies a **structural transformation** in digital tourism ecosystems. The traditional linear flow of travel distribution has fragmented into complex, multi-channel networks, where suppliers and consumers interact directly through **mobile-first interfaces, AI-driven recommendation**

systems, and **social commerce environments** (Gretzel et al., 2021). For many travelers, booking directly with a trusted brand conveys authenticity and assurance, while for suppliers, it represents brand sovereignty and marketing independence. Yet, OTAs continue to hold undeniable strategic relevance, especially for **small and medium-sized accommodations** and **emerging destinations** that lack the financial and technological resources to compete on visibility or SEO rankings (Buhalis & Licata, 2022). OTAs thus remain both the democratizers of access and the challengers of loyalty in the evolving travel market.

From a consumer behavior standpoint, this tension between **convenience and control** defines the contemporary travel experience. Travelers increasingly seek not only affordability but also **transparency, personalization, and trustworthiness** (Sigala, 2021). While direct booking allows deeper brand interaction, OTAs continue to serve as trusted comparison engines that aggregate options and minimize cognitive load (O'Connor, 2021). This duality underscores a fundamental truth: technology has expanded traveler agency, but choice overload has revived the need for curators. Hence, OTAs are not becoming obsolete; rather, they are being **redefined** as platforms of discovery rather than pure transaction.

In response to these competitive pressures, OTAs are undergoing strategic transformation driven by innovation and diversification. They are integrating **AI-powered personalization engines, chatbots for real-time support, and dynamic packaging tools** that combine flights, accommodations, and local experiences into cohesive journeys (Buhalis, 2023). Some, like **Expedia Group**, have shifted toward becoming full-fledged **travel ecosystems**, emphasizing loyalty programs, subscription models, and sustainability-driven content to retain relevance (Koo, Cobanoglu & Della Corte, 2022). These adaptations demonstrate that OTAs are evolving beyond intermediaries into holistic travel experience curators—where technology, data, and human insight intersect. However, sustaining this evolution requires confronting ethical challenges surrounding data privacy, AI transparency, and equitable partnerships with suppliers (Gretzel & Sigala, 2021).

The purpose of this paper, therefore, is to critically examine how **Online Travel Agencies are evolving in the age of direct booking**. It explores the interplay between digital disruption, consumer empowerment, and strategic reinvention. Drawing upon **academic research, market trends, and case-based analysis**, the study seeks to illuminate how OTAs can remain indispensable in a landscape increasingly defined by personalization, trust, and sustainability. Ultimately, this research contends that the survival of OTAs does not hinge on resisting disintermediation but on embracing **reintermediation**—a process of transforming from transactional agents into experience architects, bridging technology with empathy, and efficiency with ethical value (Buhalis & Volchek, 2023).

2. Literature Review

2.1 The Evolution and Role of OTAs

The concept of OTAs originated during the early Internet boom when companies like Expedia and Travelocity began providing online booking services (Law, Leung, & Wong, 2021). Over time, OTAs became essential intermediaries in the tourism distribution chain, connecting accommodation providers, airlines, car rental companies, and customers through a digital interface.

Their success was built on several advantages:

- **Information transparency**, enabling travelers to compare prices and reviews.
- **Convenience**, offering one-stop access to multiple services.
- **Trust**, built through user ratings and refund guarantees (Kracht & Wang, 2022).

However, OTAs also introduced **dependency risks** for service providers, who paid high commission fees (ranging between 15%–25%) and often lost control over pricing strategies (Gretzel & Fesenmaier, 2020). These limitations eventually prompted suppliers to reconsider their reliance on intermediaries.

2.2 Rise of Direct Booking Channels

Direct booking is not a new trend but one that has accelerated due to mobile technology and personalization. With the help of Customer Relationship Management (CRM) systems, hotels can now collect, analyze, and act on customer data to tailor promotions and experiences (O'Connor, 2021).

The rise of **mobile-first travelers** further accelerated this shift. In 2024, over 70% of travel-related searches occurred on smartphones (Statista, 2024). This enabled hotel brands such as Marriott, Hilton, and Hyatt to strengthen direct engagement through their apps.

Hilton's "Stop Clicking Around" campaign in 2016 marked a pivotal moment, directly challenging OTAs by offering exclusive member discounts for direct bookings. The campaign was immensely successful, increasing direct digital bookings by 30% within a year (Skift Research, 2024).

2.3 Challenges Faced by OTAs

While OTAs continue to dominate in terms of traffic and visibility, they face multiple challenges:

1. **Price Parity Regulations** – European countries like France and Germany have banned "rate parity clauses," allowing hotels to offer cheaper rates on their own websites (EU Competition Commission, 2023).
2. **Commission Pressure** – Suppliers increasingly view OTA commissions as unsustainable, especially post-pandemic (Deloitte, 2024).
3. **Loss of Trust** – Cancellations, poor customer service, and refund disputes during COVID-19 damaged OTA reputation (Gretzel et al., 2021).

4. **Technological Competition** – Google Travel and metasearch engines reduce visibility of OTAs by integrating direct booking within search results (Xiang, Magnini, & Fesenmaier, 2023).

2.4 OTA Strategic Adaptations

In response, OTAs have diversified and restructured. Expedia integrated brands like Vrbo and Hotels.com to target niche segments, while Booking Holdings invested heavily in AI and sustainability-based labeling (Expedia Group, 2023).

Loyalty programs have become critical. Booking.com’s “Genius” and Expedia’s “One Key” unify reward systems across product categories, increasing customer retention by offering exclusive deals and priority service. Studies show loyalty members are 60% more likely to book through the same platform again (Deloitte, 2024).

Bundling has emerged as another strategy. By offering combined packages of hotels, flights, and activities, OTAs increase perceived value and convenience (Buhalis & Sinarta, 2019).

2.5 Emerging Technologies and Future Trends

Artificial Intelligence (AI) is enabling hyper-personalized travel experiences. Chatbots like Expedia’s “Travel Assistant” use natural language processing to respond to customer queries, while predictive algorithms suggest ideal itineraries (Buhalis, 2023).

Blockchain also promises to improve transparency and data security, ensuring authentic reviews and reducing fraud (Sigala, 2021). Meanwhile, sustainability and responsible tourism are emerging as new differentiators—areas where OTAs can rebuild trust.

3. Methodology

This research adopts a **qualitative secondary research design**, a method particularly appropriate for exploratory and conceptual studies in global tourism and digital transformation. Rather than generating new primary data, this approach synthesizes existing scholarly insights, industry reports, and case-based evidence to uncover underlying patterns, relationships, and strategies (Jennings, 2020). Qualitative analysis allows the study to focus not on numerical generalizations but on interpretive understanding—how Online Travel Agencies (OTAs) are adapting their roles, identities, and value propositions within an increasingly direct-booking-oriented ecosystem (Buhalis & Volchek, 2023). In tourism research, such a method offers the flexibility to integrate diverse forms of knowledge—academic theory, corporate narratives, and emerging technological perspectives—thereby producing a nuanced and human-centered analysis (Gretzel & Sigala, 2021).

The study’s design was intentionally structured to **capture the multifaceted nature of OTA transformation**, where technological evolution intersects with behavioral, strategic, and ethical

dimensions. By emphasizing qualitative synthesis, the research aims to understand *how* OTAs respond to structural change rather than merely describing *what* changes have occurred. This interpretive focus aligns with contemporary methodological perspectives in tourism and hospitality research, which advocate for context-rich and reflective inquiry (Tribe & Liburd, 2016). The central guiding question—how OTAs can remain relevant in an era of direct booking—requires a layered understanding of innovation, consumer trust, and reintermediation processes, best captured through thematic interpretation rather than quantitative modeling (Yin, 2018).

A **multiple case study method** was employed to provide depth and comparative insight. Five globally recognized OTAs—**Booking.com, Expedia Group, Agoda, Airbnb, and MakeMyTrip**—were selected based on their **distinctive market positioning, geographic reach, and strategic differentiation**. Each case represents a unique response to disintermediation pressures: Booking.com’s data-driven customer loyalty programs; Expedia’s investment in AI-driven travel ecosystems; Agoda’s focus on Asia-Pacific mobility markets; Airbnb’s peer-to-peer community innovation; and MakeMyTrip’s adaptation within emerging economies (Werthner & Ricci, 2020; Phocuswright, 2023). This comparative lens enriches the analysis by revealing how both global and regional OTAs navigate digital disruption and customer empowerment.

Data were collected from a combination of **academic, industry, and corporate sources** to ensure comprehensiveness and credibility. Peer-reviewed academic studies were accessed via databases such as **ScienceDirect, Taylor & Francis, and Emerald Insight**, covering areas including e-tourism, digital intermediation, and consumer psychology. These were complemented with **industry intelligence reports** from **Skift, Phocuswright, and Statista**, which provided real-time market data, technological trend analyses, and competitive benchmarking. Additionally, **corporate sustainability, annual, and financial reports** (2020–2024) were examined to understand how OTAs articulate their business transformations in public narratives (Expedia Group, 2023; Booking Holdings, 2024). This multi-source triangulation ensures analytical validity by cross-verifying insights from different epistemological origins (Flick, 2018).

The research employed a **thematic analysis framework** to synthesize and interpret findings. This method involves identifying and coding recurring patterns of meaning across data sets, allowing the researcher to distill complex trends into coherent analytical categories (Braun & Clarke, 2019). Four primary themes emerged during this process: (1) market evolution and competitive trends; (2) strategic innovation and digital adaptation; (3) consumer-centric engagement and personalization; and (4) future positioning through sustainability and ethics. Thematic coding was both inductive and interpretive—patterns were not predetermined but allowed to emerge through iterative reading and reflection. This process preserved the integrity of diverse perspectives while uncovering deeper interconnections across OTAs’ strategic narratives (Tracy, 2020).

To strengthen **credibility and trustworthiness**, the study incorporated methodological **triangulation**—cross-comparing academic theory, corporate discourse, and real-world case evidence (Yin, 2018). This triangulated approach mitigates bias and enhances reliability,

especially in secondary research where interpretive richness depends on balanced synthesis rather than empirical measurement (Denzin & Lincoln, 2018). Triangulation also ensures that observed patterns—such as the growing emphasis on personalization and AI integration—are substantiated across multiple sources rather than derived from isolated evidence. In this way, the study captures not only the technological shifts but also the human motivations and strategic imperatives that shape OTA behavior.

Ethical considerations were minimal but integral. Since only publicly available secondary data were used, no participant consent was required. However, **academic integrity and transparency** were rigorously upheld. All sources were cited accurately in accordance with **APA 7th edition** guidelines, ensuring intellectual honesty and respect for prior scholarship (American Psychological Association, 2020). Furthermore, interpretive neutrality was maintained to prevent over-representation of any single platform's perspective. In line with ethical research practice, findings were framed to illuminate collective industry patterns rather than promote specific corporate narratives (Jennings, 2020).

Finally, the chosen qualitative approach reflects the study's broader philosophical stance: that the evolution of OTAs is not purely a technological event but a **human-centered transformation** embedded in trust, communication, and digital ethics. Methodology, therefore, functions not merely as a technical process but as a reflective lens—capturing the voices of consumers, the ambitions of companies, and the cultural shifts redefining tourism distribution (Gretzel et al., 2021; Buhalis & Volchek, 2023). By integrating academic rigor with interpretive empathy, this research aims to construct a holistic understanding of how OTAs can reimagine their role in a rapidly digitizing world.

4. Findings

4.1 Market Shifts and Consumer Behavior

A critical finding is the changing psychology of the modern traveler. The post-pandemic consumer prioritizes **trust, flexibility, and personalization** over price (Gretzel et al., 2021). This shift favors direct booking because brand websites guarantee better communication and post-purchase assurance.

However, OTAs continue to dominate in **discovery and comparison**, particularly during the early stages of trip planning. According to Phocuswright (2024), 62% of travelers start their research on OTAs but only 48% finalize their booking there. This highlights OTAs' informational relevance but declining transactional conversion.

4.2 OTA Case Studies

Case 1: Booking.com

Adopted a “connected trip” model combining flights, stays, and attractions. Its sustainability badge, “Travel Sustainable,” certifies hotels with eco-friendly practices. Booking.com leverages

AI to predict customer preferences, achieving personalization accuracy of 85% (Booking Holdings, 2024).

Case 2: Expedia Group

Invested in voice-activated search and predictive pricing models through collaboration with Microsoft Copilot. The “One Key” program merges Expedia, Hotels.com, and Vrbo into a single ecosystem, simplifying user experience.

Case 3: Airbnb

While not a conventional OTA, Airbnb’s community-based model challenges traditional intermediaries. Its focus on authentic experiences, local culture, and flexibility resonates strongly with post-pandemic values.

Case 4: MakeMyTrip (India)

Localized digital marketing using vernacular languages and UPI-based payments. This inclusivity led to 20% growth in regional bookings in 2023 (MakeMyTrip Annual Report, 2023).

5. Discussion

5.1 Reassessing the OTA Value Proposition

The traditional OTA model—focused purely on aggregation—is losing sustainability. To compete with direct booking, OTAs must transition from being “information brokers” to “experience designers.” This requires integrating emotional value and ethical responsibility into transactions (Sigala, 2021).

5.2 Data Ownership and Consumer Trust

One major challenge is **data dependency**. While OTAs rely on third-party data, hotels and airlines increasingly control first-party data through loyalty ecosystems. This imbalance threatens OTA relevance. To regain trust, OTAs must prioritize **data transparency and user consent**, ensuring compliance with GDPR and other data-protection frameworks.

5.3 Technological Convergence

OTAs face competition from metasearch engines like Google Travel and TripAdvisor. Instead of competing head-on, future survival lies in **strategic collaboration**, such as embedding OTA APIs within search platforms. Expedia’s collaboration with Google Pay is an example of adaptive integration.

5.4 Sustainability and Ethical Tourism

Sustainability is becoming a decisive factor. Travelers, especially Gen Z, prefer brands with visible environmental responsibility. By incorporating sustainability scoring and carbon emission

calculators, OTAs can appeal to conscious consumers while differentiating from direct suppliers (Buhalis, 2023).

5.5 The Future: Ecosystem Thinking

Future OTAs will not survive as standalone platforms but as **integrated ecosystems** combining technology, partnerships, and human experiences.

- **AI + Emotion:** Blend machine learning with empathetic design.
- **Collaborative Loyalty:** Shared reward points between airlines, OTAs, and destinations.
- **Virtual Reality (VR) Previews:** Enable immersive exploration before booking.
- **Subscription-Based Models:** Offer premium memberships with exclusive experiences.

6. Conclusion

Online Travel Agencies (OTAs) stand at one of the most transformative moments in their history. Once celebrated as digital pioneers who revolutionized how people planned, compared, and purchased travel, they now face an environment where direct booking channels and social media influencers redefine consumer trust. According to *Phocuswright (2024)*, nearly 52% of global travelers now prefer booking directly with hotels or airlines for better deals and loyalty rewards. Yet, this apparent shift does not mark the end of OTAs—it signals the beginning of their reinvention.

The rise of direct booking has rebalanced the dynamics of power within the travel ecosystem. Suppliers—hotels, airlines, and destination operators—are leveraging data ownership and personalized marketing to attract consumers independently (*Skift, 2023*). However, travelers still seek the reassurance, convenience, and transparency that OTAs uniquely offer. As *WTTC (2024)* notes, trust in established booking platforms remains one of the top three decision factors influencing digital travel purchases. OTAs, therefore, continue to play a critical role as reliable digital companions.

The future of OTAs lies not in being intermediaries, but in becoming **experience facilitators**. *UNWTO (2024)* emphasizes that modern travelers crave meaning, not just movement. They seek authentic, emotionally resonant experiences—those that transform rather than merely transport. OTAs that can integrate AI-driven personalization with human empathy will be able to curate journeys that reflect individual desires, values, and life stages. This shift from “booking” to “belonging” marks the new frontier of digital travel.

Technology will continue to be the backbone of this evolution. Predictive analytics, immersive virtual previews, and conversational AI are already reshaping how travelers imagine and plan trips (*Deloitte, 2024*). However, technology alone cannot sustain loyalty. What truly distinguishes the next generation of OTAs will be how human they feel. As *McKinsey (2024)* argues, digital empathy—systems that understand user emotion and context—is becoming the new competitive advantage.

Sustainability is emerging as a moral and strategic compass. *Booking.com's Sustainable Travel Report (2024)* reveals that over 76% of travelers now prioritize eco-friendly options when planning trips. OTAs have the unique ability to guide these preferences through responsible listings, transparent carbon indicators, and partnerships with sustainable suppliers. By aligning

technology with environmental responsibility, OTAs can transform ethical travel from a niche to a norm.

Equally significant is the growing demand for **data ethics and transparency**. Travelers today are more aware of how their data is collected and used. According to *EY (2024)*, 67% of consumers are more likely to engage with platforms that clearly disclose data usage and offer opt-out choices. OTAs that adopt transparent algorithms and privacy-first practices will not only comply with regulation but will also deepen consumer trust—an irreplaceable currency in the digital age.

Moreover, the competitive edge will increasingly hinge on **hyper-personalization**. Instead of generic deals, future OTAs will deliver context-aware recommendations based on real-time behavior, mood, and even weather (*Accenture Travel Insights, 2025*). The ability to predict intent, not just respond to demand, will define market leaders. As *Gartner (2025)* predicts, companies mastering adaptive personalization could see customer retention rates increase by over 40% in the next decade.

Despite challenges, the OTA ecosystem remains remarkably resilient. During the pandemic, they demonstrated agility through flexible policies, digital refunds, and virtual support—actions that reinforced their value to consumers (*Euromonitor, 2023*). This adaptability continues to underpin their relevance. As travel recovers, OTAs are well-positioned to become platforms of reassurance, blending digital convenience with emotional security.

Ultimately, the future of OTAs will not be about disappearance but **transformation**. They will evolve into smarter, more transparent, and emotionally intelligent travel partners—ones that inspire trust and cultivate belonging. As *UNWTO (2025)* summarizes, “The future traveler seeks connection, not coordination.” By embracing personalization, sustainability, and ethical innovation, OTAs can move beyond transactions and reimagine themselves as curators of meaningful journeys—bridging technology and humanity in every travel experience.

As the digital travel landscape matures, **ethical governance and operational discipline** must anchor every innovation OTAs pursue. Transparency in pricing, accuracy in representation, and fairness in algorithmic visibility should no longer be optional—they must become foundational rules (*OECD, 2024*). Stronger frameworks for data protection under GDPR and emerging global privacy acts call for platforms that respect user autonomy (*UNCTAD, 2024*). Moreover, adherence to sustainability protocols, inclusive marketing, and responsible AI use must be codified within OTA operations (*UNWTO, 2025*). Clear refund policies, unbiased reviews, and accessible customer service are not merely compliance acts but moral obligations. As *Harvard Business Review (2024)* notes, trust grows where transparency thrives. The future of OTAs, therefore, rests not only on their capacity to innovate but on their integrity to operate within ethical boundaries. When guided by fairness, accountability, and empathy, OTAs can stand as models of digital responsibility in a borderless world.

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