

Innovación en los ecosistemas de distribución turística: el papel de los intermediarios y nuevos agentes

Innovation in tourism distribution ecosystem: The roles of intermediaries and new agents

Asunción Fernández-Villarán¹

asun.fvillaran@deusto.es

Macarena Cuenca

macarena.cuenca@deusto.es

¹Facultad de Ciencias Sociales y Humanas (Universidad de Deusto)

²Deusto Business School (Universidad de Deusto)

Abstract

Tourism distribution is facing new challenges characterised by accelerating innovation cycles, a shift from traditional to digital business models, and ever-deepening technical know-how, which provide organisations with new opportunities to expand their capabilities and become more competitive. We aim to achieve a comprehensive and updated synthesis of current research approaches to innovation in tourism distribution ecosystems and provide proposals for future studies. This is one of the first thematic reviews to concentrate on how the tourism distribution ecosystem can be understood comprehensively through the application of the 6C framework. The study aims to conduct an in-depth review of 53 selected papers obtained from a specific search criterion employed across widespread

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repositories of Scopus and Web of Science databases, capturing the period from Jan 2001 to August 2023. In business ecosystems, advancements in information and communications technologies have triggered radical innovations in tourism distribution with the emergence of players with new business models. This affects traditional players who must innovate to remain competitive. An organisational analysis shows that new online players lead product innovation, whereas traditional distributors rely more on process innovation. Organisational innovation has emerged as necessary for both.

Keywords: tourism distribution ecosystem; innovation; thematic analysis; tourism intermediation; business ecosystem.

Resumen

La distribución turística se enfrenta a nuevos retos caracterizados por la aceleración de los ciclos de innovación, la transformación digital y unos conocimientos técnicos cada vez más profundos, que ofrecen a las organizaciones nuevas oportunidades para ampliar sus capacidades y ser más competitivas. Nuestro objetivo es lograr una síntesis exhaustiva y actualizada de los enfoques actuales de investigación sobre la innovación en los ecosistemas de distribución turística y ofrecer propuestas para futuras investigaciones. Se trata de una de las primeras revisiones temáticas que se centran en cómo el ecosistema de distribución turística puede entenderse de forma integral mediante la aplicación del marco de las 6C. El estudio revisa 53 artículos seleccionados obtenidos de las bases de datos Scopus y Web of Science, entre enero de 2001 y agosto de 2023. En los ecosistemas empresariales, los avances en las TIC han desencadenado innovaciones radicales en la distribución turística con la aparición de actores con nuevos modelos de negocio. Así, los agentes tradicionales deben innovar para seguir siendo competitivos. Los nuevos actores digitales lideran la innovación de productos, mientras que los intermediarios tradicionales se basan más en la innovación de procesos. La innovación organizativa se ha revelado necesaria para ambos.

Palabras clave: ecosistema de distribución turística; innovación; análisis temático; intermediación turística; ecosistema empresarial

1 Introduction

Tourism distribution faces new challenges characterised by accelerating innovation cycles, a shift from traditional to digital business models, and ever-deepening technical know-how. Moreover, these new technologies and the continuing evolution of digitisation provide organisations with numerous new opportunities to expand their capabilities and become more competitive (Buhalis and O' Connor, 2005; Fernández-Villarán et al., 2022).

In recent decades, innovation in tourism has attracted increasing interest from scholars. Several authors have reviewed the existing literature on innovation in the tourism sector (Cem et al., 2019; Gomezelj, 2016; Hjalager, 2010; Pikkemaat et al., 2019). Hjalager and Nordin (2011) review user-driven innovation and establish a typology of its forms in the tourism context. We find other studies that conduct systematic reviews of innovation in some subsectors, such as Madanaguli et al. (2022) on rural tourism and Ramanauskas and Banevicius (2021) on health tourism. Other studies analyse sustainability-oriented innovation in tourism (Garay et al., 2019), collaborative innovation (Marasco et al., 2018), and propose a business model innovation process applicable to the tourism business (Andrianto et al., 2022). Moreover, we identify studies that analyse the relationship between innovation and other variables, such as innovation and internationalisation (Williams and Shaw, 2011), focusing on the relationship between collaboration and innovation in tourism organisations (Zach, 2016) or ethical issues connected to innovation in hospitality (Oskam and De Visser-Amundson, 2022). However, innovation in tourism distribution has received little attention in literature reviews. Only Pikkemaat et al. (2019) relate a line of their literature review to innovation in distribution and its importance. More recently, Andrianto et al. (2022) focus on innovation in intermediary business models and encourage further research in this area. Therefore, this study elucidates innovation in tourism distribution by systematising the discussion of innovation in tourism distribution and its trends and gaps. To develop this study, we applied Pikkemaat et al.'s (2019) structure and methodology to the field of tourism distribution, who collected and updated the conclusions of previous studies.

Most of the existing review papers use citation, co-citation and co-author analysis. They rely on counting concepts or keywords to deduce their meanings (Vaismoradi et al., 2013). They are useful in revealing the relationships between scholars and their work but do not

contribute much to revealing the areas of interest for researchers and practitioners. Snyder (2019) recommend supplementing the existing co-words reviews with reviews based on narrative or thematic analysis. Thematic analysis is needed to map the thematic structure and relationships of research subjects in review studies, though it is rarely used. In thematic analysis, a theme does not necessarily reflect the frequency of its occurrence in the data and focuses on the overall themes in the data and how these themes relate to each other. Therefore, this study aims to achieve a comprehensive and updated synthesis of current research approaches to innovation in tourism distribution ecosystems and provide proposals for future studies through thematic analysis.

The remaining study is structured as follows: Sections 2 and 3 present the analytical framework and methodology. Section 4 discusses the results and Section 5 provides the concluding remarks, implications, and limitations of the study.

2. From value chain to business ecosystem in tourism distribution

Tourism distribution is a complex process involving many stakeholders and complex interactions (Fernández-Villarán et al., 2020). These relationships in tourism distribution channels have been investigated from different perspectives such as value chains, network analysis, and business ecosystems.

Porter (1985) first developed the value chain concept to describe the activities conducted by a business organisation that offers value to the end customer. Wynne et al. (2001) analyse the impact of the Internet on the distribution value chain in the tourism industry. Several authors have applied this concept to analyse innovation in tourism distribution since then (Buhalis, 2003; Fernández-Villarán et al., 2020; Kracht and Wang, 2010; Pearce and Taniguchi, 2008; Weiermair, 2006; Wynne et al., 2001). However, this perspective considers a narrow definition of the tourism distribution channel, that is, a tourism supply chain that focuses on distribution and marketing activities.

Network analysis goes a step further and analyses the dynamic distribution network to obtain deeper insights into the workings of the distribution channels over time. It investigates the structure and patterns of relationships among the actors in a network (Tran

et al., 2016). However, as Jørgensen (2017) suggests, this approach does not sufficiently reflect the complex processes involved in tourism distribution.

Recently, researchers have stressed the importance of the ecosystem as a unit of analysis to better understand the behaviour of dynamic networks, such as tourism (Blasi and Sedita, 2020). This study examines innovation in tourism distribution through the business ecosystem perspective, as proposed by Rong et al. (2015). Moore (1993) presents a new way of perceiving the business environment, in contrast to the framework developed by Porter (1985). According to Moore, a tourism distribution ecosystem should consist of an interdependent community that includes the tourism industry, public administration, tourism associations, and other stakeholders beyond the boundaries of traditional industry relationships. Overholm (2015) emphasises that business and innovation ecosystems are synonymous. Thus, considering innovation from the perspective of a business ecosystem creates a new perspective to analyse its sub-dimensions (Dias et al., 2020).

3. Methodology

This study seeks to answer the following research question: What are the main innovations in tourism distribution over the last few decades? To answer this question, this study considers the perspectives of the business ecosystem (Rong et al., 2015) combined with the types of innovation established by the Oslo Manual (OECD, 2005). It goes beyond the value chain approach and gains a more comprehensive perspective on innovation in tourism distribution ecosystems.

This state-of-the-art review differs from the previous bibliometric studies in several ways. It is also the most comprehensive using both Scopus and Web of Science databases to overcome any potential limitations of either database (Benckendorff and Zehrer, 2013) and thus, we [maintain](#) the scientific quality during the database selection process (Li et al., 2018). The analysis includes all journals and is not limited to publications from only leading tourism journals (Belhassen and Caton, 2009). This study is based on a thematic analysis of the literature (Braun and Clarke, 2023; Nowell et al., 2017). Braun and Clarke (2006) argue that thematic analysis is a qualitative research method for analysing data that entails searching across a dataset to identify, analyse, and report repeated patterns. We applied the process designed by Nowell et al. (2017) to perform this analysis. The search was conducted on 31

August 2023 and included studies during 2001-2023, using the following keywords: tourism distribution/intermediation and innovation, and language English. The search yielded 294 articles. Following Oskam and de Visser-Amundson (2022), we evaluated the titles, keywords, abstracts, and contents of each paper and coded the articles for exclusion using the following criteria: (1) not tourism intermediation/distribution-focused and (2) not innovation-related. This resulted in a final sample size of 53.

In the second phase, we independently read and coded the manuscripts of 53 articles. We used an Excel spreadsheet to log all raw data. For each article, the collected information included the title, publication year, publication journal, innovation type, and elements of the innovation ecosystem. During 2001-2023, when examining what happened in terms of innovations in tourism distribution, we must distinguish between two different layers in which changes have occurred: industry and key players. For the industry, we adopted the business ecosystem perspective by applying the 6C framework (Rong et al., 2015), namely context (main characteristics for ecosystem development), construct (necessary structure and supporting infrastructure), configuration (patterns and external relationships between partners), cooperation (collaboration mechanisms and governance system), capability (firms' capabilities to organise themselves to provide value and foster growth), and change (renewal into a new configuration pattern and the firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments) (see Table 1). These 6 dimensions allow us to define the main elements to be considered when studying the ecosystem, and to identify the significant and interrelated aspects of the ecosystem structure (Benitez, Ayala and Frank, 2020).

Table 1. 6C Framework.

Dimension	Description
Context	Drivers and barriers Lifecycle
Construct	Necessary structure Support infrastructure
Configuration	Communication pattern with customers External relationship with other partners or stakeholders

Cooperation	Coordination Mechanism: <ul style="list-style-type: none"> — Vertical company-customer relationships — Horizontal inter-organisational relationship Governance system
Capability	Firm's capabilities to organise itself to provide value and foster growth
Change	Self-renewal (or death) stage of ecosystem lifecycle theory Firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments

Source: Own elaboration based on Benitez et al. (2020), Blasi and Sedita (2020), Dias Sant'Ana et al. (2020), and Rong et al. (2015).

For the key players, we considered the organisational standpoint by considering the four types of innovation defined in the Oslo Manual (OECD, 2005): renewal and enlargement of the range of products and services (product innovation) and the associated markets (marketing innovation); establishment of new methods of production, supply, and distribution (process innovation); and introduction of changes in management, work organisation, working conditions, and workforce skills (organisational innovation) (see Table 2).

Table 2. Types of Innovation

Type of innovation	Description
Product / service innovation	Ideas for new service concepts Service quality improvement
Process innovation	Services that increase efficiency, productivity and service flow, such as adding new mobile or website
Marketing innovation	Businesses' efforts to initiate new marketing concepts or promotions, for example, initiating new social media marketing strategies or trying to establish an innovative business concept through multiple marketing channels
Managerial innovation	Changes in organizational structure or human resource management, such as enhancing employee training programs or increasing employee benefits

Source: OECD, 2005; Park et al., 2023

The third phase involved sorting and collating all the potentially relevant coded data extracted into themes.

4. Findings

4.1 Temporal dimension

Although the distribution of articles during 2001-2023 suggests a general increase in academic attention on the combined topics of intermediation/distribution tourism and innovation, the study of innovation in tourism distribution is still in its infancy. Innovation in tourism distribution is a relatively new area of interest, a fact proven by researchers who first appeared in 2001 and have intensified over the last decade. Innovation development and tourism distribution can be divided into three phases. The first phase, 2001-2006, included approximately 9.4% of the publications in the field. This can be explained, in part, by the lack of innovation activities in tourism (Weiermair, 2006). Therefore, in the first phase, research on innovation was biased towards technological innovation and focused on how information and communications technologies (ICTs) affected the traditional value chain and the role of intermediaries in e-commerce. Wynne et al. (2001) examine the Internet as an important new channel for commerce in tourism and Morgan et al. (2001) also include digital television as shopping channel. Buhalis (2003) reveals the author's analysis of tourism in the context of the dynamic relationships between ICTs and components of the traditional distribution tourism value chain. Since the earliest papers, one of the issues that has concerned the authors is the barriers faced by traditional intermediaries in the adoption of ICTs, such as increased costs and the lack of a clear strategy (Standing and Vasudavan, 2000; Buhalis and Kaldis, 2008).

In the second phase (2008-2017), which constitutes approximately 35,9% of the publications, the issue of disintermediation arises because of the widespread use of the Internet. In addition, new online agents have emerged. Researchers are addressing multi-channel strategies, interdependence between actors and networks, and the large amount of information available to consumers, which allow them to save time and eliminate certain intermediaries. However, this has become increasingly ambiguous.

The third phase (2018-2023) includes 54,7% of the publications analysed. In this period, without abandoning previous themes, issues linked to new technologies such as blockchain or smart mobiles (m-commerce) are incorporated (Ortega-Fraile, Rios-Martín and Ceballos-

Hernández, 2018). In this phase, the topic has grown substantially with the technological advancements, increasing the number of publications from 2020, and peaking at 8 in 2020. The concept of smart tourism is the most developed due to the possible elimination of intermediaries by both tourism companies and travellers (García, dos Santos and Hosseini, 2022, Jain et al, 2023).

4.2. Innovations in tourism distribution: A look at the industry

As previously mentioned, the 6C framework maps the business ecosystem using the following dimensions: context, construct, configuration, cooperation, capability, and change. Table 3 shows the contributions of the authors analysed in each dimension.

Table 3. Thematic Analysis of the Corpus

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
Morgan, Pritchard, Abbott	2001	Tourism distribution	Internet and digital television	WWW and digital television shopping	Direct, easy access to information				
Wynne et al.	2001	Distribution value chain	Internet	Internet new channel	Changes in tourist experience		Relationships with customers		Disintermediation and reintermediation
Buhalis	2003	Airlines	Internet as key driver	E-commerce	Interface with consumers	Internet connect with all stakeholders	Coordinating partners.	Web sites: direct communication	Disintermediation
Özgener and Iraz	2006	Tourism industry	CRM	Customer-based structures				Interactive relationship between business and customer	
Weiermair	2006	Value Chain	Globalisation and ICTs Customer driven	Increased revenue as driver	Customer behaviour changes				
Pearce and Taniguchi	2008	Attractions and accommodation businesses	Internet	Multichannel				Structure of channel and staff costs	Disintermediation

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
Clerides et al.	2008	Tour operators	Internet	Asymmetric information				Specialized knowledge	
Lin et al.	2009	Destination Tour Operator	Internet					Service performance evaluation	
Kracht and Wang	2010	Tourism industry	ICTs	Changes in structure	ICTs: a great amount of information and allow to save time	Tourism distribution participants add value to other participants with whom they have relationships	Web like network	Technology is often an insufficient substitute for human contact	Disintermediation and reintermediation Complexity
Salvado	2011	Travel agencies	ICT and e-commerce	New agents	New customer segments	Proliferation of alliances and partnership		A new kind of professional: Travel innovator New organizational paradigm based on resilient virtual models	New ways of doing business, learning to manage in a rational manner
Berne et al.	2012	Distribution channel	ICT		Increasing participation of consumers	Power			Market structure Consumer behaviour
Ford et al.	2012	Tourism organizations	Network power			Power	Organizations must continuously review their relationships with others		
Neuts et al.	2013	Destination	e-services		E-services more relevant for foreign tourists				

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
Spencer and Buhalis	2014	Channel strategy	ICTs / Internet		Information asymmetry reduction		ICT alter the role of competition		Disintermediation and reintermediation
Ban and Popa	2015	Travel agencies	ICT and internet		Emphasize the focus on attention and developing a relationship with the customer.				Disintermediation
Moisescu	2015	Travel agencies	Corporate Social Responsibility						
Mesa et al.	2015	Value chain	ICTs	The intermediaries are the true pillars of the supply chain		Networks dependence			Disintermediation
Díaz et al.	2015	Sales agents	On line channel		Massive amounts of information, customization, time savings, reducing the need for human interaction	Online channel allows retail companies to consolidate existing markets and expand into new markets		Sales agents may be able to develop high levels of competencies in areas that Internet channels cannot easily learn.	Disintermediation
Ban and Popa	2015	Global distribution systems (GDSs)	Internet		Internet creates confusion due to the huge amount of information	Six models of a virtual organization	Traditional travel agencies should collaborate with GDSs to make their offers more quickly and		Disintermediation

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
							easily to access.		
Abou-Shouk et al.	2016	SMEs travel agencies	E-commerce barriers	Travel and tourism are generally fragmented and information-oriented industries			Collaboration with other travel partners: strengthen their competitive advantage, support their sales and revenues, and increase their opportunities to expand	Attracting new services and investment could help travel agents to work independently from tour wholesalers, airlines and hotels	
Beritelli and Schegg	2016	Hotels	ICTs	Complexity Multi channel: Meta-search engines; evolution of Google,	Consumers, at the end, deal with a network of information		Interdependence between channels		
Gupta	2016	Travel agencies	ICTSs and internet	New online travel intermediaries Altered the role of tourism intermediaries and the structure of tourism	Consumer behavior	ICTs and internet have transformed the roles and relationships in travel industry		Personalised	Desintermediation
Tran et al.	2016	Tour operators Travel agencies	Internet and media technologies Virtual network			The connections between actors in the network were defined by web connection			

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
						between them			
Basyuk et al.	2017	Tourism services	Internet communications	Suppliers; Tour operators; Travel agencies; Information intermediaries, Consumers				Capability of dealing with various distribution channels	
Schofield et al.	2018	Marketing Destination Bureau			Relationships, as key factor.	Importance of social capital	Substantia stakeholder commitment and trust.	Co-creation to increase the range of value chain activities. Capability of building long-term relationships with partners.	
Tao et al.	2018	Hospitality industry	M-commerce - apps - GPS		Enables customers worldwide to reserve hotel rooms anytime, anywhere	Own mobile booking app or appears in a booking app of another stakeholder	Customers expect quick response, fast transaction and minimum exertion	Mobile technologies	Integrating mobile technologies in the hotels business model
Tom Dieck et al.	2018	Value chain	ICTs	Traditional and new online agents.	Empower tourist to book directly online	Power	Highly competitive industry	Traditional tour operators are adopting online business model Adoption of latest mobile technologies	Switches; destination marketing
Calveras and Orfila-Sintes	2019	Hotels	ITCs	New agents: infomediaries	Direct distribution			Intermediaries will need to develop new	Disintermediation hipermediation

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
								capabilities to add value to avoid direct sales	
Huang Yin et al.	2019	Hotels	Channel conflicts	Inter-organizational relationship between hotels and OTAs.		Power		Both hotels and OPAs should develop capabilities of inter-organizational collaboration.	Sustainable relationships between hotels and OTAs
Kizildag et al.	2019	Hospitality and tourism firms	Blockchain technology					Technological capabilities.	Disintermediation
Barna and Semak	2020	Tour operators	Innovation cluster				Public and private cooperation	Development of capabilities related to the innovative technologies introduced.	Introduction of innovative technologies
Fernández-Villarán et al.	2020	Value chain: new agents	Internet	New online agents.	During the entire customer journey, travellers are online		Cooperation of traditional tourism intermediaries and new agents.	Digital capabilities	
Hamidi et al.	2020	Tourism agencies	ICTs		Value co-creation to involve customers in the design and development of products, services, and experiences.			Develop capabilities to facilitate value co-creation	From value creation to value co-creation

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
Melkic and Cavlek	2020	Tourism intermediaries	Blockchain as driver	Customers and Service providers	Peer-to-peer capacity		Network effects	Adoption of blockchain technology Development of capabilities related with cybersecurity.	Risk of further disintermediation
Rojas-Bueno et al.	2020	Corporate travel sector (MICE) Value chain	Association	Primary and secondary actors		Power	For cooperation to occur, real value needs to be created by intermediaries	Intermediaries should develop capabilities to continuously provide real value and make it noticeable in the eyes of clients	Disintermediation
Thees, Erschbamer, and Pechlaner	2020	Tourism value chain	Blockchain						Disintermediation
Turker and Ozdemir	2020	e-distributors (booking.com and Airbnb)	Internet	Booking.com: online reservation system Airbnb: peer-to-peer marketplace		Power - empowering		Companies should also start measuring and communicating their social and environmental impacts.	Disintermediation Social and environmental Impacts
Romero and Tejada	2020	Hotel SMEs	Tourism intermediaries are drivers on innovation	Hotels SMEs, tour operators, OTAs and travel agencies	Commission	Dependence		Develop digitalization capabilities	Hotels SMEs tend to undertake incremental innovation related to offer better conditions

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
									or higher quality
Kontis and Skoultzos	2021	Hotels OTAs Marketing channels	Digitalisation	Growth of e-intermediaries	Change the existing traditional marketing structures of tourism	Cooperation level and commitment			Tourism distribution strategies Disintermediation
Parekh, Jaffer, Bhanushali and Shukla.	2021	Medical tourism	Blockchain	Tour operators and OTAs	Co-creation	Blockchain facilitates cooperation between stakeholders			Disintermediation
Pencarelli et al.	2021	Supply chain	ICTs		Establish relationship with specialized company to design the entertainment solutions.	Power		Certain capabilities could be outsourced	
Rubio, Villaseñor and Yagüe	2021	Retail distribution	Digital distribution		Customers' increased power and control	For promoting service innovation, the most significant antecedent is perceived support, followed by trust			Value co-creation
Soifer et al.	2021	MICE	VR tour			Establish relationship with specialized company to produce the VR tour.		New technologies to attract new market segments These capabilities could be	

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
								outsourced	
Ampountolas and Chiffer	2022	Hospitality	Blockchain		Peer-to-peer capacity	Network effects			Further disintermediation
Dadić et al.	2022	Hotels	COVID-19		Consumers tend to make short-term reservations and pursue flexible cancellation policies	OTAs dominate indirect bookings Dependency	Cooperation with social networks to attract younger population of tourists	Hotels are developing their capability, modernising their own websites to enhance the number of direct bookings.	Disintermediation
Fernández-Villarán et al.	2022	DMC Rural Tourism	Digitalisation				Cooperation	New capabilities related with their necessary product, process, marketing and organizational innovation Local producers will need to generate new capabilities related with digitalisation and direct sales	Disintermediation
Soltani-Nejad et al.	2022	Omnichannel	Technology	Technology serves as infrastructure in smart tourism, combining hardware, software,		Technologies to assist stakeholders in making better-informed decisions	Requires integration of direct and indirect distribution channels.	Development of technological capabilities to create constant interaction and communication	

Author	Year	Context		Construct	Configuration	Cooperation		Capability	Change
		Business	Missions, driver, Barrier	Structure and Infrastructure	Pattern with customers	External relationship	Coordination mechanism	Abilities	Pattern shift
				and network				with tourists to improve their experience	
Aamir, Atsan and Khan	2023	Travel agents	Technology adoption	Multisided-platforms		Global content from multiple-channels and multiple-providers	Integration		
Bulchand-Gidumal, William Secin, O'Connor and Buhalis	2023	Hotels	Artificial Intelligence (AI)	AI reengineers internal processes and procedure and transforms distribution models	AI performs mass personalization and customization	Predictive and augmented product and service design	Innovative partnership	Hotel marketing-specific knowledge	Smart and predictive customer care
Calvo, Morales, Del Arco, and Couto	2023	Accommodation	P2P platforms	Local entrepreneurs					Land use
Guerrero-Rodríguez, Jiménez and Figueroa	2023	Accommodation industry Airbnb	P2P platforms	Modify the structure	Modify travel experience				
Jain, Singh, Mishra and Rana	2023	Air and hospitality industry	Blockchain			Transparency, disintermediation, automation			Disintermediation
Raad et al.	2023	OTAs	E-commerce	Sharing economy		Value network		Capability in managing exchange	

a) Context

Starting with the context and in line with the stakeholder theory, first, we must consider why the industry exists and the role of tourism intermediaries. According to Calveras and Orfila-Sintes (2019), there are three traditional roles: 1) coordinating a variety of goods and services that form the tourism product, 2) facilitating search for information on the components of

the tourism product, and 3) resolving quality uncertainty because of the ability to build a brand name and reputation. Second, we must consider how macro environmental factors affect the tourism distribution industry. A classical tool for this type of analysis is PESTEL (Johnson et al., 2017), which distinguishes the influence of politics (e.g. innovation stimulated through state support), economics (e.g. inflation, unemployment, emergent economies), socioculture (e.g. lifestyle, increase in life expectancy, COVID-19), technology (the Internet, e-commerce, mobile technologies, blockchain), environmental (sustainability, awareness of carbon footprint), and legal (for laws). However, although all of them are relevant, most studies have indicated how the industry has been especially affected by advancements in ICTs that have changed its traditional structure and altered the positions of power. This is because of the radical innovations implemented because of advancements in information. Most scholars specifically and consistently consider relationships with customers and users (other agents or organisations) to be the main drivers of innovativeness.

b) Construct and change

As in other distribution industries, the traditional structure of tourism distribution relies on wholesalers (e.g. tour operators) and retailers (e.g. travel agencies). Rojas-Bueno et al. (2020) explain that there can be different levels of distribution, from direct distribution from suppliers to consumers (Level 0) to short (Level 1) or long channels (Levels 2 and 3). They review the contributions of different authors who posit that the irruption of ICTs has resulted in both disintermediation and reintermediation, leading to an increasingly complex array of traditional and new online intermediaries such as online travel agencies (OTAs). In line with the idea that the industry becomes more complex owing to ICTs, Fernández-Villarán et al. (2020) acknowledge the existence of other agents, not considered intermediaries but important for the successful customer journey, such as social media, search engines, blogs, chatbots, online speakers, tech companies, APP and the web, peer-to-peer, metasearch engines, or fintech.

Power in tourism distribution networks is an important factor for creating value (Ford et al., 2012). Considering the changes in the positions of power in the industry, Tom Dieck et al. (2018) state that OTAs are expropriating market power from traditional tour operators, especially the smaller ones. However, islands such as Crete may be an exception because

tour operators remain powerful. Calveras and Orfila-Sintes (2019) support this idea when analysing the Balearic Islands. Nevertheless, the highly competitive nature of the tourism distribution industry affects not only traditional players but also new online intermediaries. Many OTAs have either merged or disappeared (Tom Dieck et al., 2018).

Intermediation may make sense depending on the context. Fernández-Villarán et al. (2022) show that destination-management companies (DMCs) have lost relevance to rural tourism. However, Rojas-Bueno et al. (2020) defend the importance of intermediation in meetings, incentives, conferences, and exhibition (MICE) tourism by considering both the rational and risk-averse nature of the corporate sector and the complexity surrounding the organisation of a corporate or association event.

These changes have introduced innovation to the industry. The emergence of OTAs is considered a radical innovation itself (Raad et al., 2023), while traditional tourism intermediaries have reacted by introducing innovative technologies to remain competitive (Barna and Semak, 2020). Moreover, ICTs have enabled more active consumers to obtain information and coordinate their own tourism products, and a reduction in packaged tours has been observed (Calveras and Orfila-Sintes, 2019). Consequently, the traditional role of tourism intermediaries has eroded, and further innovation is required by distributors to search new ways of adding value and continuing to be relevant.

Another radical innovation that remains in its initial stage but will affect the tourism distribution industry in the future is blockchain, online information that cannot be altered and is not confidential, but users are not identified (Ampountolas and Chiffer, 2022; Jain et al, 2023; Kizildag et al., 2019; Melkić and Čavlek, 2020). Parekh et al. (2021) highlight the huge potential of blockchain applied to medical tourism and identify the core features of this technology. First, they point out its decentralised nature that implies robustness and security, which is crucial when dealing with sensitive data, such as medical records. Second, they refer to the participation of various parties in the system and the establishment of trust thanks to the use of consensus mechanisms. Third, transparency is mentioned as a result of Blockchain's ability to track money, documents, and other commodities and therefore to enable traceability. Finally, Parekh et al. (2021) draw attention to the automatisisation of "Smart Contracts" and its related benefits. Several hospitality companies have been working

intensively on blockchain's potential (e.g. Expedia); however, its implementation is initially slower than that of many market participants (Ampountolas and Chiffer, 2022). There are still several unresolved issues regarding the initial cost of the technology, lack of regulation, transaction speed, energy consumption, environmental cost, user privacy protection, and overall reliability of the system (Jain et al, 2023; Kizildag et al., 2019; Parekh et al, 2021). However, there is a consensus that blockchain can revolutionise the future, increasing the risk of disintermediation and enabling new business models (Ampountolas and Chiffer, 2022; Jain et al, 2023; Kizildag et al., 2019; Melkic and Cavlek, 2020). Disintermediation is one of the biggest attractions for hospitality and tourism companies to invest in blockchain technology, for instance, airlines are working in this direction (Kizildag et al., 2019). This technology is driven by the millennial generation seeking transparency, disintermediation and automation (Jain et al, 2023; Parekh et al., 2021).

In a scenario where airlines invest in blockchain to avoid intermediation (Kizildag et al., 2019) or hotels modernise their websites to enhance the number of direct bookings (Dadić et al., 2022), it can be realised that suppliers simultaneously act as suppliers and competitors of tourism distributors. This inevitably affects external relationships among partners and their cooperation.

c) Configuration and cooperation

Stakeholders are considered essential for tourism distribution ecosystems (Konietzko et al., 2020). Therefore, Freeman's (1984) approach is essential for understanding the relationships and interactions among stakeholders in tourism distribution (Nguyen et al., 2019). According to Mitchell et al. (1997), stakeholder theory includes the following fundamental factors: (1) the relationship between stakeholders, (2) the position of the stakeholder, (3) dependence, (4) stakeholder power, (5) contractual relationships, and (6) interests. According to the stakeholder theory, value creation arises from collaboration facilitated by the relationships between an organisation and its stakeholders (Freeman, 2010). Similarly, Buhalis (2003) asserts that collaboration is the key to innovation, highlighting the growing importance of co-competition in the face of ICTs' challenges. Schofield et al. (2018) studied the Glasgow City Marketing Bureau as a focal firm nurturing an extensive network of stakeholders and developing collaborative innovations in the context

of event management in Glasgow. Owing to stakeholders' commitment and trust, this case study shows how the bureau has been able to go beyond the traditional focus of co-creation to increase the range of value chain activities, including co-conception, co-design, co-production, co-promotion, co-pricing, and co-distribution. Barna and Semak (2020) reflect on how innovation can be fostered through the presence of an innovation cluster at the destination level. Furthermore, Hamidi et al. (2020) refer to the potential for innovation through collaboration with customers and proposed a conceptual framework for value co-creation in small- and medium-sized (SME) tourism agencies.

The Internet is perceived as a platform that facilitates collaboration since its earliest publications (Buhalis, 2003; Kracht and Wang, 2010). However, not all collaborations have the same innovation potential. Romero and Tejada (2020) examine the relationship between hotels and distributors and conclude that hotels that depend on OTAs develop digitalisation capabilities that help them innovate in their own sales channels. By contrast, hotels that depend on tour operators or traditional travel agencies tend to develop fewer innovation capabilities.

Basyuk et al. (2017) argue that a strategic framework for organising the distribution activities of tourism enterprises should consider both traditional and new channels. Most authors agree that producers face a multi-channel strategy (Beritelli and Schegg, 2016; Díaz et al., 2015; Mesa et al., 2015; Pearce and Taniguchi, 2008), or an omni-channel strategy (Soltani-Nejad et al., 2022), which becomes more complex as new ICTs emerge (Kracht and Wang, 2010). This might be a challenge, especially if several intermediaries are involved because cooperation is not always easy. Yin et al. (2019) explain that conflicts and disputes between hotels and OTAs have become increasingly public in recent years, and to avoid them, they propose an inter-organisational relationship development model between hotels and OTAs based on loose coupling theory.

d) Capability

Considering the above, different key players in the industry must develop new capabilities to remain relevant, such as organisational capabilities that might help them cooperate more successfully in the business ecosystem or technological capabilities. Tom Dieck et al. (2018) state that most companies that are disappearing are those that do not capitalise on the latest

technologies. An important decision made by different players is to identify which capabilities can be outsourced and which should be developed internally (Freije and Freije, 2019). For instance, Soifer et al. (2021) claim that convention facilities can add value to event planners by offering virtual reality (VR) tours; however, an externally specialised company can design and develop a VR tour. In other cases, the capabilities should be developed internally. Tao et al. (2018) argue that hotels should integrate mobile technology into their business models. Nevertheless, sensing, seizing, and reconfiguring dynamic capabilities (Teece, 2007) may not be easy (or difficult) for all players. For instance, SMEs seem to be late technology adopters (Raad et al., 2023) and therefore are more vulnerable than larger and more powerful players (Ford et al., 2012). Of particular interest is the study of Bulchand-Gidumal et al. (2023) that introduces the concept of augmented workers in hotels: employees who use AI-powered technologies to perform tasks better and deliver higher-value services. Finally, it is interesting to consider Kizildag et al. (2019) in relation to blockchain capabilities. They acknowledge that other industries such as banking and fintech are more focused on machine learning, artificial intelligence, and cloud computing than the hospitality and tourism industries, which face challenges in building these technological capabilities.

4.3. Innovations in tourism distribution: The key players

After considering the main innovations at the industry level, we now adopt a complementary perspective, approaching innovation at the organisational level through the perspective of the four types of innovation defined in the Oslo Manual (OECD, 2005): product, process, marketing, and organisational innovation.

a) Suppliers

As discussed previously, suppliers also undertake direct distribution to final consumers and consequently need to be examined. The most cited suppliers in the analysed corpus were hotels (Beritelli and Schegg, 2016; Calveras and Orfila-Sintes, 2019; Dadić et al., 2022; Gupta, 2016; Moisescu, 2015; Romero and Tejada, 2020; Tao et al., 2018; Yin et al., 2019), followed by MICE suppliers (Rojas et al., 2020; Soifer et al., 2021), destinations (Neuts et al., 2013; Schofield et al., 2018), and airline companies (Buhalis, 2003). Although no article focuses on transport companies, airlines are considered the most interested in investing in

blockchain (Kizildag et al., 2019) and suppliers are less dependent on intermediaries (Calveras and Orfila-Sintes, 2019).

Suppliers embrace ICTs to increase their direct sales, mainly by embarking on process innovations. They modernise their websites (Dadić et al., 2022) or facilitate the booking process by adopting mobile technologies (Tao et al., 2018). However, this affects marketing innovation because suppliers are aware that user experience occurs in both physical and digital environments. Implementing and developing artificial intelligence in hotels will enable hotel managers to deal with future marketing challenges (Bulchand-Gidumal et al., 2023). The literature on collaborative innovation also indicates that organisational innovation adopts new ways of working successfully in networks (Schofield et al., 2018; Yin et al., 2018). Product innovation may be less evident, although Tao et al. (2018) argue that mobile apps can offer a tailored experience and simultaneously enhance convenience (such as mobile check-ins and mobile room keys).

b) Tourism intermediaries

Tour operators and travel agencies are the most-cited traditional tourism intermediaries (Abou-Shouk et al., 2016; Barna and Semak, 2020; Clerides et al., 2008; Ford et al., 2012; Hamidi et al., 2020; Lin et al., 2009; Salvado, 2011; Tom Dieck et al., 2018), followed by global distribution systems (Foris et al., 2021) and DMCs (Fernández-Villarán et al., 2022).

As Barna and Semak (2020) emphasise, tour operators mainly use innovative technologies to optimise processes, increase productivity by implementing dynamic pricing, enhance booking status tracking, or achieve a greater speed of information transfer, especially with travel agencies. Even though it is not mentioned in the analysed papers, the digital transformation of traditional tour operators implies organisational innovation.

Offline travel agencies, especially if they are small, are not innovative and value traditional tools, such as paper catalogues, and introduce digitalised services, such as digital posters and high-touch tools, as substitutes for traditional services (Pencarelli et al., 2021). However, their innovation is linked to marketing, as their basis of differentiation is customer contact, and value co-creation is an interesting direction (Hamidi et al., 2020). Product innovation is the weakest type of innovation implemented by offline tourism intermediaries. However,

some authors refer to the possibility of dynamic packaging enabled by latest technologies (Tom Dieck et al., 2018).

Nevertheless, OTAs remain at the forefront of product innovation. Raad et al. (2023) distinguish between same-side (producer-to-producer and consumer-to-consumer) and cross-side innovations (producer-to-consumer). An example of same-side innovations on the producers' side is the development of a new feature to help hotels manage their properties and automatically collect the prices of hotel rivals so that hotel managers can use it to plan price strategies (product innovation). An example of same-side innovation on the consumer side is a loyalty program that prevents customers from returning to the platform (marketing innovation). Finally, cross-side innovations are related to managing the exchange between producers and consumers, and innovating in the main exchange functions of filtering, matching, facilitating, and curating (product innovation). Raad et al. (2023) conclude that cross-side innovations have a greater impact on OTA performance than same-side innovations. Consequently, OTAs are expected to pursue product innovation.

OTAs do not need to undertake digital transformation because they are born digitally. They are drivers of innovation and those who collaborate with them are pushed to innovate (Romero and Tejada, 2020). For digital organisations, it is easy to embrace agile methodologies that set innovation at their core. However, what are the challenges? Turker and Ozdemir (2020) highlight sustainability and referred to the potential community degradation caused by Airbnbs. They propose a social sustainability model to help e-distributors innovate in this field. As they would need to measure and communicate their social and environmental impacts, their challenges relate to organisational innovation.

In recent times, companies are turning to digital platforms, also known as multi-service platforms (MSP); which are intermediary systems that create value by facilitating interactions between two or more stakeholders through digital channels and earn commissions for their matchmaking services (Aamir, Atsan and Khan, 2023). In this way, the authors add a new agent to the tourism intermediation system, the MSPs.

5. Conclusions

In this study, we presented a review of innovation research in tourism intermediation published in academic journals over the period between 2001 and 2023 using thematic analysis. Most of the analysed articles focus on how ICTs affect traditional tourism intermediaries, new business models, and disintermediation. However, in line with Pickerman et al. (2019), there is a gap in the literature on innovation processes, driving forces, barriers to tourism innovation, innovation and economic performance, the diffusion of innovation, the role of entrepreneurship, policy studies and evaluations, academia and innovation, and the development of tourism innovation theories.

5.1. Theoretical implications

The main theoretical contribution of this study is thematic analysis. Most literature reviews use content analysis. Content analysis describes the characteristics of a document's content by examining who says what, to whom, and with what effect (Vaismoradi et al., 2013). It is based on counting concepts or keywords to deduce their meanings. However, in thematic analysis, a theme does not necessarily reflect the frequency of its occurrence in the data. In content analysis, researchers count instances of concepts and keywords coded in substantial textual data and focus less on comparing or contrasting those codes. Thematic analysis focuses on the overall themes in the data and how these themes relate to each other. Content analysis usually counts the occurrences of key concepts or words to deduce meaning, whereas thematic analysis assigns meaning by extracting high-level ideas. The approach and framework presented in this study supplement the existing understanding of tourism distribution, not as a substitute for it.

The second theoretical implication is the analysis of innovation in tourism distribution from a business ecosystem perspective. This study aims to go beyond the value chain and gain a more comprehensive perspective of the tourism distribution ecosystem within the 6C framework. Most of the existing literature focuses mainly on analysing customer behaviour, intention, perception, attitude and awareness towards technology adoption and related opportunities (Raluca, 2022). The results also highlight that the stakeholder theory plays an important role in the analysis of innovation in tourism distribution ecosystems. Stakeholder

support and collaboration, specifically tailored to customer needs, are important for successfully developing innovation.

5.2. Agenda for future research

The results of our research offer management guidelines for tourism intermediaries and other agents involved in the tourism distribution process. First, ICTs offer possibilities for improving the customer experience. Social networks, artificial intelligence, and virtual assistants allow customers to obtain customer data and offer personalised services to improve service innovation. Tourism distribution stakeholders must plan to adopt ICTs in their business operations.

Currently, tourism distribution is undergoing an unprecedented transformation driven by new technologies, the emergence of new players, climate change, and disruptive business models in a digital context. The dynamic development of technology, including artificial intelligence and blockchain, pushes intermediaries to offer new solutions to customers. These challenges require the development of new tourism planning and management tools to improve tourism competitiveness (SEGITTUR, Fundación Cotec e Infyde, 2021). In this context, tourism intermediaries are pressured to innovate their services to satisfy customer needs, improve competitiveness, and enhance performance. The results highlight that knowledge acquisition is crucial for companies to foster innovation and strengthen competitiveness. This situation has significant implications for the education sector as universities and hospitality schools need to educate graduates in new digital skills (Bulchand-Gidumal et al., 2023) and in soft skills (Čuić Tanković, Vitezić and Kraljić, 2023).

The airlines that created the global distribution systems (GDS) to facilitate the booking of airline tickets in a simpler way and which represented a disruptive innovation, have created a new language, the NDC (New Distribution Capability) with the intention of taking power away from them. This strategy is still too recent to be assessed, but several forums are talking about the future of this language and its relationship with the current GDS (Pastor and Fernández-Villarán, 2021). Large travel corporations are increasingly opting to develop their products vertically to become self-sufficient. They have physical agencies, online agencies, hotels, logistics companies (airport handling), airlines, tour operators, incoming

companies, etc. (Fernández-Villarán *et al.*, 2022). It leads to a change in commercial relations and the value chain of tourism distribution.

Since the earliest publications, one of the main challenges for tourism has been the potential of the Internet to eliminate intermediaries in the entire value chain of the tourism experience. This situation raises the importance of issues such as the creation of value along the value chain, power, collaboration, and interdependence between stakeholders. The industry has experienced radical innovation with the emergence of OTAs pursuing product innovation. However, traditional intermediaries rely more on incremental and process innovation and have adopted a secondary role in tourism innovation ecosystems. Therefore, an important managerial implication for them is to rethink their entire business model and shift from incremental to disruptive innovation, when possible, to adapt and face the future.

5.3. Limitations

This study expounds the less studied topic of innovation in tourism distribution. It offers a new perspective that inspires practitioners and academics in their future actions. Our study's perspective covers both the industry and key players, applying recognised frameworks, such as the 6C framework and Oslo Manual. However, the outcome is neither a new model nor a new framework. Another important limitation is the selected sample, which is limited to peer-reviewed academic journals ranked by the SSCI. However, this constraint is necessary to make tasks manageable. Finally, although thematic analysis has been a useful tool for reaching this new perspective, it also entails important limitations linked to its qualitative nature.

Therefore, this study establishes a systematic benchmark for future research on innovation in the tourism distribution ecosystem and offers a research method for understanding the entire system (Liu *et al.*, 2023).

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