

TOURISM DISTRIBUTION CHANNELS IN THE LUXURY TRAVEL SEGMENT: OUTBOUND TOUR OPERATOR PERSPECTIVES

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ABSTRACT

This study examines distribution channels in the luxury travel segment from the perspective of outbound tour operators. Employing a qualitative approach, we conducted 23 semi-structured in-depth interviews. All respondents reported that they try to shorten their channel length and approach both travelers and service providers directly to fulfill and satisfy luxury travelers' needs for unique and personalized services. Furthermore, our findings indicate that these special needs in the luxury travel segment have been instrumental in driving TDC disintermediation. This study shed light on the concrete TDC strategies and concrete guidance for outbound tour operators, DMCs, and luxury hotels.

Key Words: tourism distribution channels, luxury travel segment, outbound tour operators, disintermediation

INTRODUCTION

With increased competition in the tourism industry the issue of distribution has become more prominent (Bitner & Booms, 1982; Pearce, 2010) and has generated a considerable volume of studies on tourism distribution channels (henceforth, TDCs). However, most of these studies have concentrated on the high-volume, low-price travel market (Buhalis, 2000; Pearce & Tan, 2004) and have neglected the structural characteristics of TDCs in the low-volume, high-price luxury travel market.

Luxury travel has long been the fastest-growing segment of the tourism industry (Park, et al., 2010). The concept of luxury travel has changed from traditional luxury products such as five-star hotels and restaurants to various types of exclusive and unique experiences (Bakker, 2005; Park, et al., 2010). Previous studies on luxury travel have tended to concentrate on consumer behaviors such as symbolic and/or utilitarian consumption motivation (Correia & Kozak, 2012; Correia, et al., 2016), luxury shopping (Park, et al., 2010), and cross-cultural differences (Kozak, 2002). Consumer perception of what makes products, services, and experiences 'luxurious' is based on several inherent product/service characteristics, such as excellence, exclusiveness, uniqueness (Kapferer, 1998; Park, et al., 2010), ability to enhance social status (Correia & Kozak, 2012; Correia, et al., 2016), and customization and privacy (Zhang & Tse, 2018). Because no consensus exists on a definition of 'luxury' products, services, and experiences, in this study, we adopt as our working definition that 'luxury' travel exhibits at least one of these inherent characteristics, in addition to being priced towards the high end of the market.

While previous studies have fundamentally examined luxury travel and tourism from the perspective of traveler behaviors, this study seeks to fill this research gap in the literature by focusing on the distribution channels of the luxury travel market and specifically on the outbound tour operator-type of channel intermediary. The rationale for studying outbound tour operators is that they are well-positioned to provide valuable insights into the nature of luxury travel distribution because they play a pivotal role in the luxury segment channel. The primary aim of this study is to explore the structure of TDC in the luxury travel segment.

LITERATURE REVIEW

Most mass travel market suppliers use multi-channel distribution systems for a broader market coverage. TDC structure diagrams in the literature include both direct and indirect channels. Pearce and Tan (2004) identified a variety of distribution channels used to approach group-travel and independent-travel segments and reported that the breadth of product appeal, capacity issues, and the level of commissionable products are three factors that influence differences in TDC structure. Furthermore, Pearce, et al. (2007), identified that the TDC structures vary due to market-centric factors such as the characteristics of travelers, travel styles, and the specialization of

intermediaries. In addition, Andrade and Smith (2020) report that for suppliers in small islands destinations local intermediaries, such as destination-based ground operators and DMCs, are important in building an effective business network to connect the destination to geographically distant markets and intermediaries.

Considering the influence of information and communication technologies, Kracht and Wang (2010) examined the historical evolution and progression of TDC structure and reported that the advance of ICT did not reduce the length of TDC nor simplified the TDC structure, but instead resulted in much longer channel length with a variety of new online intermediaries and more complex array of intermediaries. Furthermore, Fountoulaki, et al. (2015) and Tom Dieck, et al. (2018) empirically updated Kracht and Wang's (2010) TDC structure in the Europe destination context by adding additional new online communication and distribution channels such as social media, online review sites, and mobile channels. As a result, these researchers have clarified that traditional tourism intermediaries are losing their competitive advantage to online platforms (Fountoulaki, et al., 2015; Kracht & Wang, 2010; Law et al., 2015). The loss of competitive advantage of traditional travel agencies has led to their *disintermediation* from the TDC. Moreover, studies on disintermediation have typically focused on traditional intermediaries in the high-volume, low-price segment (Kaewkitipong, 2010; Kracht & Wang, 2010; Law & Lau, 2004; Law, et al., 2015).

Despite the uniqueness of luxury travel and tourism, few studies have focused on the TDC in the luxury segment. While cost-conscious tourists are increasingly booking their tour products online, about 70% of the high-end travelers arrange their travels through travel agencies and other intermediaries (Aeberhard, et al., 2020). Meanwhile, online distribution channels based on digitalization play an increasingly important role for marketing communication instead of sales because luxury tourism is based on providing and delivering personalized, in-person services and maintaining personal relationships of trust (Aeberhard, et al., 2020). Indeed, as part of a study on the decision-making process of specialist travel agents in luxury wildlife tourism, Buckley and Mossaz (2016) concluded that it is paramount for high-end travel agents to establish long-term relationships of mutual trust with individual clients and tour operators. They contrasted this with travel agents in the high-volume lower-price segment who tend to be driven by commission and incentives. Furthermore, Le, et al. (2018) examined distribution channels from the perspective of high-end hotels in Vietnam and found that all hotels used multiple distribution channels, among which international tour wholesalers and operators were the most important.

Finally, Andrade and Smith (2020) investigated the distribution channel structures in a Brazilian small island destination and reported that luxury accommodation providers not only employ direct channels –such as corporate websites, word of mouth, specialized magazines, brochures, and books– for product distribution and marketing communication, but also use indirect channels, in the form of intermediaries such as tour operators, travel agencies, and OTAs that specialize in luxury travel. Based on the above review, we can conclude that there is a dearth of a) specific research on TDCs in the luxury travel segment and b) research on TDCs from the perspective of luxury outbound tour operators. Thus, this study focuses on the nature of TDC in the luxury travel segment and uses outbound tour operators as informants.

METHODOLOGY

Due to the lack of extant research on TDCs in the luxury travel segment, we opted for a qualitative approach through in-depth semi-structured interviews. Interview questions are developed based on a review of extant literature and the lead author's previous working experience in the tourism industry. Questions include topics such as channel mix, channel length, and channel width to clarify the characteristics of the TDC structure. In addition, we also included questions on how tour operators communicate with travelers and service providers.

Because of the exclusive and closed nature of the luxury travel industry, we needed to resort to a combination of a two-stage convenience and snowball sampling. First, we conducted 17 interviews with tradeshow buyers of the ILTM Cannes (International Luxury Travel Market) during December 3–6, 2018. ILTM Cannes is the largest global B2B tradeshow specializing in luxury travel. Only buyers who meet the tradeshow's strict criteria can attend ILTM. These attendance criteria ensure that the members of the sampling pool –tradeshow buyers of ILTM Cannes– are appropriate for the current study. Interviews were conducted in the lounge area of the tradeshow hall, where participants spent time when they were not negotiating business deals. Second, we used the snowball sampling method by asking our ILTM respondents to introduce their compeers and partners in the same high-end tourism market to us. Based on this referral, we individually interviewed three France-based respondents at their respective offices from December 7-10, 2018, and three more respondents in Japan from

July to August 2019. We thus interviewed a total of 23 outbound tour operator representatives from a variety of locations. Table 1 specifies the profiles of respondents and their companies.

Table 1: Profiles of respondents and their companies

Code	job title	Company location	Main destinations	Main targets	Budget level
R 1	CMO	Canada; US	Europe; Asia	FIT leisure	Medium; high-end
R 2	Product Manager	Guatemala	Europe	FIT leisure	Medium; high-end
R 3	CEO	Latvia	Asia; America	FIT leisure	High-end
R 4	Owner	Denmark	America; Asia	FIT leisure	High-end
R 5	Commercial Director	Russia	Europe; Asia	FIT leisure	High-end
R 6	Founder	US	Europe; Asia	FIT leisure	High-end
R 7	Marketing Director	Canada	America; Europe	FIT wedding & honeymoon	Medium; high-end
R 8	Managing Director	Italy	Europe; America	FIT leisure; small packaged group	Medium; high-end
R 9	Group Manager	Switzerland	America; Asia	FIT leisure; small packaged group	Medium; high-end
R 10	CMO	China	Europe; America; Asia	FIT leisure; MICE	Medium; high-end
R 11	Co-founder	China; UK	Europe; America; Asia	FIT leisure; small packaged group	Medium; high-end
R 12	Executive Director	Russia	Europe; America	FIT leisure; small packaged group	Medium; high-end
R 13	Managing Director	US	Japan	FIT leisure; small packaged group	High-end
R 14	Travel Specialist	France	Japan; Taiwan; South Korea	FIT leisure; small packaged group	Medium; high-end
R 15	Project Chief	France	Europe; America	MICE	Medium; high-end
R 16	Managing Director	Germany	Asia; Europe	small packaged group; health & well-being tour	Medium; high-end
R 17	CEO	China	Europe; America; Asia	FIT leisure; small packaged group	Medium; high-end
R 18	Senior Product Manager	Belgium	Europe; America	FIT leisure; small packaged group	Medium; high-end
R 19	CEO	France	Japan	FIT leisure; small packaged group	Medium; high-end
R 20	Head of Premium Services	UAE	Europe, America, Asia	Luxury UHNW Travelers FIT	High-end
R 21	CEO	Australia	Asia	small packaged group; golf tour	Medium; high-end
R 22	Sales Manager	China	Europe; America; Asia	small packaged group; golf tour	Medium; high-end
R 23	Manager	US	Europe; America; Asia	MICE; FIT; packaged leisure tourists	Medium; high-end

At the beginning of the interviews, we confirmed the qualification of our interviewees for this research by asking questions pertaining to their career experience, position, company size, and the geographical coverage of their business. Then we explained the purpose of the research and described general TDC structures identified in prior research (Kracht & Wang, 2010; Pearce, et al., 2007). We worked from a semi-structured question list, but also flexibly adapted to any additional but pertinent topics raised by our interviewees. While most of the interviews were in English, three interviews were conducted in Chinese and one in Japanese. We assured that personal information and company names would be kept strictly confidential within the research team. Interviews were audio-recorded with respondents' approval and spanned from 20 to 80 minutes, depending on their schedules. After naturalized transcription and translation evaluation, we coded the data and conducted content analysis via Nvivo 12 (Saldaña, 2016).

FINDINGS

All respondents reported that they try to shorten their channel length and approach both travelers and service providers directly. The most important reason for this is a direct consequence of the inherent characteristics of the luxury travel market in which travelers have differentiated, personalized, and high-level requests. Tour operators consequently need to communicate with these travelers in the most efficient and effective way and respond to these requests with tailor-made service and seamless experience. Since outbound tour operators are

intermediaries between travelers in the outbound market and service providers in the inbound destination, we divide the TDC structure into the market and destination sides. Due to the fast development of internet communication technology, it is impossible to ignore marketing communication channels (promotion) when discussing distribution channels (place). In accordance with research on omni-channel marketing (e.g., Payne, et al., 2017; Kotler, et al., 2017) that various types of channels function interactively and synthetically, we initially incorporate communication channels stated by our respondents into this luxury TDC structure. Figure 1 paints the overall picture of the TDC structure from the perspective of outbound tour operators in the luxury travel market. In the following sections, we will explicate sales and communication channels on the market side and procurement and communication channels on the destination side.

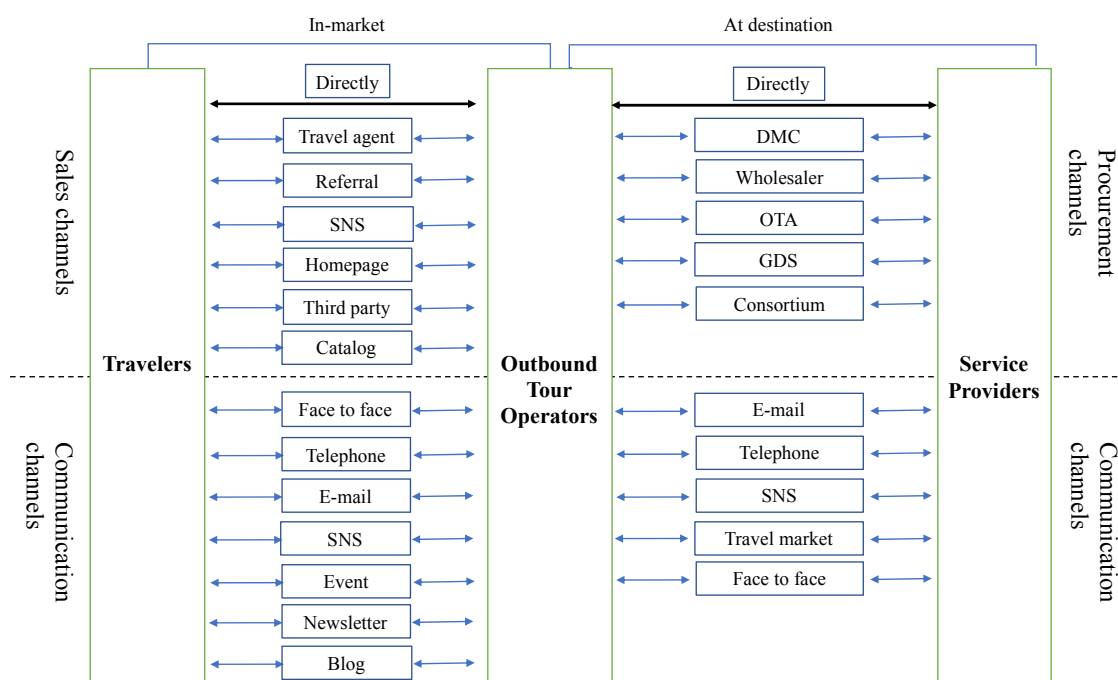


Figure 1. Structure of tourism distribution channels: the perspective from outbound tour operators

Sales channels on the market side

All respondents indicated that they primarily focus on B2C sales channels, while only 7 respondents said that they complement their main B2C business with the B2B channel of approaching clients via travel agents, but that this only represents a small share of their business (R1, R11, R13, R14, R16, R18, R19). Furthermore, they mentioned that they principally design customized products based on individual requests from travel agents rather than selling pre-prepared standardized tour packages through travel agents. This is one key characteristic that differentiates the B2B business model in the luxury travel market from that of the low-end high-volume travel market.

Other B2C channels used by tour operators include referrals, corporate homepages, SNS (Social Network Service), third parties, and catalogs. Regarding catalogs, only one respondent (R16) addressed the use of catalogs as a distribution channel. Results show that this is not a popular channel for luxury tour operators. About half of the respondents emphasized the importance of referral and word of mouth by their existing clients, for example, “*The most important is that clients coming back from their trip say they had the best time in their lives. And then they will give us more business*” (R13). One respondent even said that referrals are the most important driver of business growth (R6) while another mentioned that they expect “*each current client [to] introduce 2-3 new clients every year*” (R17). This may be attributed to the fact that most of the travelers in the high-end market are frequent travelers and they live in similar social bubbles, which helps tour operators win travelers’ loyalty and generate more sales (R9). Only one respondent from China (R22) mentioned giving rewards or gifts to clients who refer others.

Regarding the tour operators’ online sales channels, i.e., corporate websites and SNS, several respondents reported that they make use of their corporate websites (R13, R14, R16) and SNS accounts (R7, R13, R14, R16) as sales channels. As reported by R14, “*Clients see our website and find some places in which they are*

interested, and then they fill out the inquiry form online and send it to us.” R13, based in the US, told us that he has even served clients from Asia through the online sales channel. An analysis of the website contents of our respondents’ companies revealed that these websites primarily contain the following information: concept of travel, knowledge of destinations, and personal travel experiences of the companies’ travel designers, with an emphasis on commitment to service quality and unique experience. This markedly differs from the usual website contents of tour operators in the low-end high-volume market.

Around one-third of the respondents reported that they actively collaborate with and promote their services through third parties (i.e., investment banks, wealth management companies, real estate management companies, industry organizations, alumni associations, golf clubs, and upscale private schools) because those organizations are closely connected to the wealthy (R2, R6, R8, R10, R17, R21, R22). Collaborations include co-hosting events, sponsorship, and travel consulting services. For example, R17 collaborates with a local bank and offers a travel concierge and butler service to the bank’s VIP clients free of charge, which has allowed R17 to build a long-term relationship with these potential clients and to accumulate a database of their travel style, - preferences, and -habits.

Communication channels on the market side

Communication in this study is comprised of operating communication and marketing communication. However, it is always challenging to distinctly separate one from the other in communication channels. In regard to daily operating communication, more than half of the respondents report that the most frequently used channels are telephone, email, and face-to-face. In contrast to that in the mass-market, call centers are scarcely used by our respondents. Face-to-face communication is emphasized for building personal relationships (R8). In addition, more than one-third of the respondents stress the importance of SNS (i.e., Facebook, Instagram, and WeChat) as both marketing communication and operating communication channels. WeChat, emphasized mostly by Chinese respondents, is used in branding, public relations, promotions, payment collections, and operating interaction (R10, R17, R22). While acknowledging the absolute convenience and immediacy of WeChat, respondents (R17, R22) also claim its adverse effects such as causing overwork and feelings of constantly being under stress for the tour operators’ employees. Therefore, R1 and R13 now explicitly refuse to use any SNS for daily operating communication either with clients or within their companies. Other marketing communication channels mentioned by a minority of respondents are event activities like travel shows, salons, and workshops (R7, R9, R10, R14), newsletters (R9, R14, R15, R21), and blogs (R6, R10, R11).

Procurement channels on the destination side

All respondents clarify that they keep good relationships with DMCs (Destination Management Companies) at destinations, one of the most important procurement channels. Respondents also acknowledge that only DMCs can offer them high-quality organic products and services for their high-end clients rather than other intermediaries or even themselves. On the other hand, wherever destinations respondents are familiar with or have resources directly, they primarily try to operate by themselves through direct procurement from hotels, restaurants, and transport companies, in which way they can more effectively reduce the possibility of miscommunication, manage product quality, and save cost (e.g., R3, R4, R15, R22).

Furthermore, respondents show different attitudes toward the ethnic origin of DMCs. For example, R17 argues that DMCs run by local people at the destination can offer a more organic and differentiated experience even though they may have some difficulties in understanding clients’ needs. On the other hand, some respondents (R15, R22) clarify their preference for DMCs run by people who share the same culture and language, respectively, for the convenience of communication and work efficiency.

Regarding the direct procurement from hotels, a typical pattern clarified by Chinese respondents (R10, R11, R17) is selecting hotels deliberately out of major hotel groups like LHW (The Leading Hotels of the World) and then handling through the VIP agent of the hotel group instead of each individual hotel, whereas some respondents who are small scale or do not have a large number of transactions at minor destinations prefer to procure hotel rooms from wholesalers to save cost (R1, R11, R12, R16).

Other channels addressed by respondents include OTA, GDS, and the tourism consortium. Most respondents state that operations by OTAs lack flexibility and cannot meet their needs for personalized service, which leads to an explicit refusal of using OTAs in the luxury travel market (R10, R13). However, some respondents admit that they reluctantly handle simple cases through OTAs. In contrast, some respondents argue that some OTAs offer B2B services with relative flexibility for personalization (R11, R22).

GDS is used as a channel by some respondents limited to flight reservations, which is not the current research domain. Finally, the tourism consortium is a unique channel used by outbound tour operators in the luxury travel market. Virtuoso, a membership organization specializing in luxury travel, is the most well-known one. Because of its fame and strict member acknowledgment, respondents address that it is reliable to procure from Virtuoso members (R2, R6, R7).

Communication channels in the destination side

Communication channels at destinations are relatively simple compared with those in the market. Most of the communication at the destination is for operating procurements. All respondents simplified that the most frequently used communication channel is email. Some respondents also elucidate that they use telephone and/or SNS (i.e., WhatsApp, Skype, WeChat) for emergent communication (R7, R11, R15, R17). In addition, some respondents (R6, R9, R13) clarify that they join travel markets and/or meet their suppliers face-to-face for relationship management, which functions as a marketing communication channel.

DISCUSSION

The fundamental difference between the luxury and mass travel market is based on the difference in customer needs. Customer needs for personalization, flexibility, and uniqueness in the luxury travel market lead to disintermediation both in the market and at the destination. Outbound tour operators in the luxury travel market can seldom offer preliminarily developed products due to the inherent market characteristics and personalized traveler needs. In general, they develop tailor-made products according to travelers' individual requests. Consequently, communication plays an essential role in the luxury travel market compared with the mass travel market. Once customers are satisfied with the engagement and personalized travel experience, they tend to be loyal in the long term and tend to share their experiences within their communities. Furthermore, to deliver the personalized requests of luxury travelers precisely and efficiently to service suppliers at destinations, outbound tour operators tend to reduce the possibilities of misunderstanding and information loss during communication and thus endeavor to get rid of intermediaries by working with final service suppliers directly. Consequently, the differentiated traveler needs and wants, and the pursuit of communication effectiveness and efficiency drive outbound tour operators in the luxury travel market toward disintermediation.

Unlike extant studies on TDC structure, we incorporated communication channels (i.e., marketing communication and operational communication channels) into our TDC model. The rationale for doing so is based on the concept of customer touchpoints and customer experience in omni-channel strategies and integrated marketing communications. More and more consumers combine multiple channels during their decision-making process (Flavián, et al., 2020). Consequently, marketers should respond to these consumer preferences by integrating touchpoints for a seamless customer experience. Although academic research and practical implementation of channel integration or omni-channel strategy in the general retailing industry have been gaining prominence, few studies have focused on channel integration in the tourism industry. The dominant model of the TDC structure reflects that outbound tour operators have limited themselves to the use of multi-channel strategies for approaching clients in the market and suppliers at destinations due to the difficulty of tracking travelers' cross-channel activities and behaviors. This is why respondents rarely mentioned integrating multiple channels to enhance the customer experience. However, our study indicates that one basic rule for outbound tour operators in the luxury travel segment is to delight customers with a seamless experience through shortened distribution channels.

This study also provides guidance for TDC strategies and tactics for outbound tour operators newly entering the luxury travel market segment. Practitioners need to be aware that the business model in the luxury travel segment dramatically differs from that in the mass travel segment. Although it is difficult for outbound tour operators to develop tour packages beforehand, they can always research luxury travelers' needs, wants, and trends regarding destinations, accommodation characteristics, activities, and travel styles. Based on the market information, they can develop networks and relationships in advance with service providers and partners at the destinations. Unlike low-end high-volume businesses in the mass segment, the volume in the luxury segment is relatively low. As a result, outbound tour operators often do not receive any requests for a particular destination for prolonged periods. Nevertheless, they should constantly renew their knowledge of the destination through comprehensive communication with a variety of partners. Furthermore, even though online channels are not critical to sales contribution in the luxury travel segment, various types of online touchpoints with travelers have always been essential for creating a seamless travel experience. Outbound tour operators, for instance, may initially publicize the referrals and word of mouth of satisfied customers in the online communities in which wealthy people participate. Our study also finds that tour operators can also make use of third parties such as

investment banks, credit card corporations, golf clubs, and international schools as channels of communicating with their potential customers.

Although this study sheds light on the TDC from the perspective of outbound tour operators, our findings also indirectly have managerial implications for DMCs and luxury hotels. As a type of intermediary, DMCs are also at risk of disintermediation and should develop unique selling propositions and exclusive resources that outbound tour operators have difficulty accessing or handling independently. Furthermore, DMCs should continuously deepen and broaden their knowledge of the destination while strengthening their networks in a broader geographic scope. In addition, DMCs should also build close relationships with key luxury hotels at the destination and ensure that luxury hotels understand DMCs' significance to their operation and handling, and they can lower the risk of being disintermediated proactively by hotels at the destination. On the other hand, from the perspective of luxury hotels, they should maintain multi-channel strategies, including online and offline channels. Luxury hotels need to strengthen their online distribution channels with OTAs and their direct channel of homepages, which is most profitable without commission cost. Furthermore, luxury hotels should offer a high level of concierge service expected by outbound tour operators and travelers. Finally, for luxury hotels and DMCs, flexibility and responsiveness are critical because tour operators ask for the personalized services requested by luxury travelers.

The relatively small sample size limits the generalizability of the study's findings. Future research should investigate the characteristics and dynamics of the TDC structure by focusing on other channel members in the luxury travel market. In addition, our findings may be used as the basis for more quantitative research.

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