The democratization of tourism distribution: a Horizon 2050 paper

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Abstract

Purpose – Emphasizing the critical role of technology-enabled distribution in tourism, this study, a viewpoint, aims to highlight the potential of democratized technologies in readdressing the competitive imbalance between small- and medium-sized tourism enterprises (SMTEs) and their larger peers in today’s online marketplace. By enhancing competitiveness and performance, democratized technologies can strengthen the resilience, sustainability and competitive position of the SMTEs on which tourism depends, helping to support the Horizon 2050 agenda and UN’s Sustainable Development Goals.

Design/methodology/approach – Examining the development of online and electronic distribution in tourism, the viewpoint identifies the key challenges to the successful use of technology-based distribution systems by SMTEs, as well as highlights the trend toward democratized technologies as a potential solution to help improve technology take-up and performance.

Findings – With no/low initial capital or operating costs, and little need for technical expertise, democratized technologies have the potential to overcome two of the three key challenges limiting the successful adoption and use of distribution technologies by SMTEs. The key blockage remains one of managerial awareness and acceptability. With informal organization structures, little managerial or technical training and an ingrained reluctance to change, SMTE managers remain unfamiliar of the possibilities offered by this developing trend. While this challenge could be addressed by awareness building and training, in the longer run, it is likely that more substantial progress will arise from generational change in SMTE management, with digitally native successors more likely to exploit this development to improve competitiveness and performance.

Originality/value – Emphasizing the pivotal role that democratized technology can potentially play in redressing the competitive imbalance between SMTEs and their larger peers in the distribution space, this viewpoint serves as a call for action for tourism businesses to re-examine their approach to technology adoption and leverage democratized technologies to address current deficiencies in their distribution approach, helping to improve competitiveness and performance, thus supporting the Horizon 2050 initiative and furthering the UN’s Sustainable Development Goals.

Keywords Online distribution, Technology adoption, Small and medium-sized enterprises, SMTEs, Horizon 2050

Paper type Viewpoint

旅游分销的民主化：2050年展望视角

摘要

目标：这篇观点论文强调了技术驱动的分销在旅游业中的关键作用。强调了民主化技术在重新解决中小旅游企业（SMTEs）与其大型同行在当今市场中竞争失衡方面的潜力，通过提高竞争力和绩效。民主化技术可以加强旅游业所依赖的SMTE的韧性、可持续性和竞争地位。有助于支持地平线2050倡议和联合国可持续发展目标。

设计/方法：该观点论文考察了在线和电子分销在旅游业的发展，确定了SMTE成功使用基于技术的分销系统的关键挑战，并强调了民主化技术作为帮助提高技术使用率和性能的潜在解决方案的趋势。

研究结果：由于没有较高的初始成本或运营成本，也几乎不需要技术水平知识，民主化技术有可能克服限制SMTE成功采用和使用分销技术的三个关键挑战中的两个。关键的障碍仍然是管理意识和接受性。由于非正式的组织结构、很少的管理和技术培训，以及根深蒂固的习惯，SMTE的管理人员仍然不熟悉这一发展趋势所提供的可能性。虽然这一挑战可以通过提高认知和培训来解决，但从长远来看，SMTE管理的代际变革可能会带来更大的进展。数字原生继任者更有可能利用这一发展来提高竞争力和绩效。

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TOURISM REVIEW

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La democratización de la distribución turística: Un documento de horizonte 2050

Resumen

Objetivo: Haciendo hincapié en el papel fundamental de la distribución posibilitada por la tecnología en el turismo, este punto de vista destaca el potencial de las tecnologías democratizadas para corregir el desequilibrio competitivo entre las Pequeñas y Medianas Empresas Turísticas (PYMETs) y sus homólogas de mayor tamaño en el mercado online actual. Al mejorar la competitividad y el rendimiento, las tecnologías democratizadas pueden reforzar la resistencia, la sostenibilidad y la posición competitiva de las PYMETs de las que depende el turismo, contribuyendo así a apoyar la agenda Horizonte 2050 y los Objetivos de Desarrollo Sostenible de la ONU.

Diseño/metodología/enfoque: Examinando el desarrollo de la distribución online y electrónica en el turismo, el punto de vista identifica los desafíos clave para el uso exitoso de los sistemas de distribución basados en la tecnología por parte de las PYMETs, así como destaca la tendencia hacia las tecnologías democratizadas como una solución potencial para ayudar a mejorar la adopción y el rendimiento de la tecnología.

Resultados: Con unos costes iniciales de capital o de funcionamiento nulos o bajos, y poca necesidad de conocimientos técnicos, las tecnologías democratizadas tienen el potencial de superar dos de los tres retos clave que limitan la adopción y el uso con éxito de las tecnologías de distribución por parte de las PYMETs. El bloqueo clave permanece en la concienciación y la aceptación por parte de los directivos. Con estructuras organizativas informales, escasa formación técnica o de gestión y una arraigada reticencia al cambio, los directivos de las PYMETs permanecen desconocedores de las posibilidades que ofrece esta tendencia en desarrollo. Aunque este reto podría abordarse mediante la concienciación y la formación, a largo plazo es probable que surjan progresos más sustanciales del cambio generacional en la gestión de las PYMETs, con sucesores nativos digitales más propensos a explotar este desarrollo para mejorar la competitividad y el rendimiento.

Originalidad/valor: Haciendo especial hincapié en el potencial y fundamental papel que la tecnología democratizada puede desempeñar a la hora de corregir el desequilibrio competitivo entre las PYMETs y sus homólogas de mayor tamaño en el espacio de la distribución, este punto de vista sirve de llamada a la acción para que las empresas turísticas reexaminen su enfoque de la adopción de tecnología y aprovechen las tecnologías democratizadas para subsanar las deficiencias actuales en su enfoque de la distribución, ayudando a mejorar la competitividad y el rendimiento, apoyando así la iniciativa Horizonte 2050 y fomentando los Objetivos de Desarrollo Sostenible de la ONU.

Palabras clave: Distribución online, Adopción de tecnología, Pequeñas y Medianas Empresas, PYMEs, Horizonte 2050

Tipo de papel: Punto de vista

1. Introduction

Given their high fixed cost nature, driving top line revenues in tourism businesses is vitally important to ensure profitability and business continuity. In addition, the perishable nature of the tourism product means that unsold inventory cannot be stored for subsequent sale at a later date, making selling each and every product or service each and every night critical to firm success and profitability and placing distribution at the core of tourism operations (Werthner and Ricci, 2004). Suppliers have traditionally leveraged a wide variety of techniques to help maximize revenues, including sales, marketing, distribution, revenue management, merchandising, CRM, loyalty and management of online reputation/eWOM (collectively be referred to as “distribution” in the remainder of this viewpoint).

Technologies and digital processes to support this broad distribution function have become well established over the past three decades, resulting in profound changes in how tourism firms engage with customers, reshaping the sector’s value chain and competitive dynamics. Most tourism suppliers now make use of multiple simultaneous routes to the marketplace, blending together a portfolio of direct and indirect channels of distribution to position their product offering in front of potential consumers (O’Connor and Frew, 2002).
At the same time, most recognize the importance of prioritizing direct business, investing in sales/marketing efforts to drive qualified traffic to their brand.com direct website(s); engaging in merchandising activities to cross sell/upsell to maximize revenue per customer; and actively managing customer relationships/online reputation and online marketing activity to ensure prior customers subsequently return (O’Connor, 2023a). As a result, distribution, in its broadest form, has become a core activities of tourism businesses’ value chain, critical to ongoing profitability and success (Law et al., 2015).

However, from a sustainability perspective, a key challenge is that not all industry constituents have equal access to effective and efficient distribution (O’Connor, 2023b). In most markets, the majority of tourism operators are small- and medium-sized, or even micro-sized, enterprises (Peters et al., 2019). Individually insignificant, collectively, they own and operate the majority of accommodation, restaurants and attractions in tourist areas (Gamble, 1991). Deeply rooted in their local communities, small- and medium-sized tourism enterprises (SMTEs) influence on both the product offering and the sector is disproportional. For example, in addition to providing employment and injections of much needed funds into local economies, by delivering niche products with the authenticity that large companies often neglect, SMTEs bring diversity and legitimacy to the market (Buhal and Peters, 2006). As such, they underwrite the attractiveness, economic success and competitiveness of many tourism destinations, playing a pivotal role in regional development, driving sustainability and contributing to economic growth and resilience (Holzmann and Gregori, 2023).

However, SMTEs are often reluctant adopters and users of technology, typically lacking the financial, technical and expertise resources to exploit it effectively (Kuokkanen and Bouchon, 2021). In addition, many lack the managerial and organizational capacity to be able to integrate such systems into everyday operations (Stankovska et al., 2016). As a result, many SMTEs fail to exploit the potential of online distribution, operating at a competitive disadvantage both with their larger peers (Gazzoli et al., 2008) but also with the online distribution platforms that have emerged in the travel marketplace and positioned themselves between fragmented tourism suppliers and the customer (O’Connor, 2023a).

Overcoming these adoption challenges has proved challenging. However, recent global trends, in particular a growing movement toward the democratization of technology-based systems, have potential to address these issues. Developments such as freemium, open source, the cloud, platform-as-a-service (PaaS), microservices, open APIs, interoperability and more instinctive user interfaces are making technology-based systems cheaper, more approachable and more usable (Andriole, 2022). If embraced by SMTEs, this movement could potentially help overcome many of the past challenges of adoption technology-based systems and help level the playing field in terms of distribution system use by SMTEs. By improving performance, at both the firm and the destination level, this would help build resilience by allowing SMTEs to compete more effectively, reducing the power imbalance between SMTEs and their larger peers, as well as promoting more sustainable economic growth for the many tourism destinations highly dependent on SMTEs for their economic success, contributing to several UN Sustainable Development Goals (SDGs). This viewpoint introduces the concept of democratization of technology, highlighting its implication for the tourism sector and identifying a path forward for both academic research and industry.

2. Past developments: the origins of tourism distribution

Electronic distribution within tourism originated from inventory/pricing control systems developed by the major US airlines following deregulation (O’Connor, 1999). Facing an explosion in the permutations of fares following deregulation, airlines developed internal computerized systems to aide in managing ever more complex operations, subsequently forwardly integrating them into retail travel agencies to facilitate agent bookings, in effect creating today’s global distribution systems (GDS). Hotels, car rental companies and, to a lesser extent, other tourism suppliers, subsequently created their own central reservation systems.
systems (CRS), integrating them with the GDS to connect to the valuable corporate travel agency market. However, developing and operating computerized systems was technical and expensive, putting the potential of electronic distribution outside the scope of all but the largest travel companies, placing SMTEs in particular at a competitive disadvantage compared to their larger peers (Buhalis and Peters, 2006).

The evolution of the Web as a consumer information and ecommerce medium in the 1990s promised to challenge this advantage (Berne et al., 2012; Werthner and Klein, 1999). The developing Web offered even the smallest supplier the opportunity to develop and promote cost-effective websites that could (theoretically at least) reach out directly to consumers, bypassing both the proprietary electronic distribution systems and traditional (offline) travel intermediaries such as tour operators and travel agents (Gratzer et al., 2004). This not only presented substantial cost advantages in terms of commissions and transaction fees saved but also provided direct contact with the customer, offering great potential for cross-selling, up-selling and driving repeat purchases (Buhalis and Licata, 2002). Over the past three decades, online channels have become consumers’ preferred way of seeking out travel information and making reservations. Within Europe, an estimated 62% of travel gross booking revenues in 2022 originated through online channels, with corresponding Figure 1 for the USA and Asia at 63% and 52%, respectively (PhocusWright, 2023a, 2023b, 2023c). This evolution in distribution has prompted the reengineering of the marketing, distribution and management of tourism products and destinations, with the online marketplace firmly cemented at the core of how tourism businesses promote and sell their products to consumers (Buhalis and O’Connor, 2005).

However, the Web’s much promised potential as a leveler of tourism distribution largely never came to pass. While many SMTEs created consumer-facing websites to reach out directly to consumers, few were of sufficient quality, nor had sufficient marketing budget, to compete effectively with the more sophisticated online presences of their larger peers. In addition, seeing the potential of Web distribution, traditional intermediaries such as travel agents developed their own Web presences, competing with suppliers for the customer (Gratzer et al., 2004). Companies from outside tourism, noting the ease of market entry and market potential, also launched online presences, positioning themselves as technology-driven intermediaries, ultimately evolving into today’s online travel agencies (OTAs) (Law et al., 2015). And, with the number and variety of potential routes between customers and suppliers multiplying, metasearch sites, which facilitated the comparison of price and availability across multiple points-of-sale, also emerged, adding another potential intermediary to the complex network of tourism distribution channels.

Collectively, these developments greatly increased both complexity and competitive intensity in the online travel market, making it harder for SMTEs to exploit the potential of online distribution (Berné et al., 2015). From the supplier’s perspective, adopting each additional distribution opportunity typically not only required investment in term of technology-based systems but also needed to be (pro)actively managed (O’Connor and Frew, 2002). As when adopting any technology, SMTEs have traditionally faced a series of challenges, which have limited their ability to leverage modern distribution. From the literature, these can be characterized into three interrelated categories:

1. **Inadequate financial resources**: Exploiting tourism distribution channels, be they electronic or online, has traditionally implied both capital and operational costs. However, SMTEs lack sufficient capital to invest in exploiting new technologies or integrate them into their operations. In addition, many existing systems essentially facilitate third party – as opposed to direct – distribution, necessitating the payment of commissions and driving up distribution costs (Toh et al., 2011). With SMTEs typically family businesses operating on small margins, such financial constraints reduce their capacity to exploit existing technology-based distribution systems and compete on a level playing field with their larger peers.
2. **Lack of technical expertise:** Making use of electronic and online distribution systems typically requires access to specialist knowledge and expertise (O’Connor, 1999). Being able to adopting new technologies and systems is based on employees’ knowledge, experience and competencies (Stankovska et al., 2016). Unlike their larger peers, who typically have specialized teams dedicated to distribution related issues such as online marketing, intermediary relationships and information systems, SMTEs’ small size and limited personnel provide few opportunities for division of labor or professional training (Buhalis, 1996). As a result, they typically lack both dedicated personnel and the requisite specialized expertise, limiting their awareness of opportunities available on the marketplace and ability to effectively exploit today’s constantly evolving online distribution systems.

3. **Managerial bandwidth:** Essentially family businesses, SMTEs typically lack professional management capable of thinking strategically and investing (in terms of both time and money) in distribution (Ben Aissa and Goaied, 2016). Most operate informal organizational structures, with the family involved in both management and operations (Buhalis, 1996). Formal training is minimal, with most managers having learned on the job. As a result, managements’ focus is highly operational and typically more concerned about finding staff to serve tomorrow’s breakfast rather than optimizing distribution and maximizing revenue in a years’ time. Productivity is typically low, with lifestyle considerations often as important as
driving profitability (Peters et al., 2019). SMTEs also typically suffer from a reluctance to embrace change (AlBar and Hoque, 2019). For example, the emergence of OTAs offered SMTEs an additional and powerful potential route to the market. However, rather than seizing this opportunity, many SMTEs perceive such systems to be threats and “stealing their businesses,” despite compelling evidence that working with OTAs results in higher revenues and profitability, particularly for smaller firms (Anderson, 2009; Beritelli, and Schegg, 2016; Abdullah et al., 2022).

Collectively, these three constraints reduce SMTEs’ capacity to effectively exploit existing and emerging distribution systems (Ford et al., 2012), threatening their resilience and competitiveness (Stankovska et al., 2016). This sharply contrasts with their larger peers, be they hotel chains, airlines or car rental agencies, who can also profit from the economies of scale and scope that size brings (O’Connor, 2023b). It also places SMTEs in an unfavorable competitive position vis-a-vis both OTAs and pureplay technology companies such as Google, who have (not unlimited, but substantially more) access to budget, dedicated teams devoted to technology and innovation, as well as the management capacity to think strategically about developing technologies, business models and distribution channels (Ruediger et al., 2012). While this problem has been smoldering for some years, consumers’ stampede toward digital channels during COVID-19 has accentuated the challenge, placing SMTEs in an even more unfavorable competitive position (Sigala, 2020).

As a result, given the importance of online distribution in today’s travel sector, with most consumers preferring to search for, and make, bookings through online channels (Davari et al., 2022), SMTEs currently operate at a substantial competitive disadvantage, leaving themselves open to underperformance and exploitation (Ozdemir et al., 2023). Given the importance of SMTEs for the sustainability and viability of tourism destinations, this challenge threatens the competitiveness and economic stability of both SMTEs individually and their corresponding host destinations, endangering their future viability at both the micro and macro levels (Dredge et al., 2019).

3. Future developments: the democratization of technology

Although a “digital divide” clearly currently exists between SMTEs and larger tourism players in terms of their ability to successfully exploit distribution, a potential solution is offered by an emerging development known as the “democratization” of technology. This represents a conspicuous trend in contemporary society, reflected in a pivotal shift in the accessibility of technology and characterized by the widening availability of cutting-edge technologies, once accessible only by a small group of elite participants, to a broader and more diverse audience (Benkler, 2006). The phenomenon began with the open-source movement, epitomized by projects like Linux and Apache, where a global community of developers work collectively to develop and enhance the software’s capabilities (Lakhani and von Hippel, 2003). Democratization is further propelled by the advent of affordable hardware platforms, such as the Raspberry Pi, which enables individuals and companies to prototype and implement hardware-based systems without substantial financial barriers (Eisenberg and Buechley, 2008).

While the democratization trend started at the infrastructure level, it has gradually extended to the application layer. As development costs fall and capabilities increase, an increasing number of digital tools and services are emerging that are cheap (or, in many cases, free); user-friendly; ubiquitous; and easy to implement (Nuseir and Aljumah, 2020). Prominent examples include platforms such as Squarespace and WordPress, which allows online presences to be built at low/no cost; free business intelligence tools such as Google Analytics, which facilitate the understanding of website user behavior; and ChatGPT and other generative AI tools that help create high-quality content quickly, easily and at no cost. Within the travel vertical, a similar trend can be observed with, for example, Google making participation in its travel metasearch product free for independent hotel properties, or...
software company Zoho offering its highly customizable zero-code platform Creator to hotels seeking a property management system product at zero cost.

Democratized technologies have already had dramatic effects on other sectors. Most notable is media production (music, film, print media and even software production) where democratized tools have fundamentally revolutionized their structure and business models, creating digital disruption. In particular, the growing availability of democratized sound recording hardware/software in the early 2000s made processes previously accessible solely through an expensive professional studio available to all (Goodwin, 2006). And, in addition to self-recording, artists began self-distributing through online platforms such as Spotify and YouTube, effectively making the formerly all-powerful record labels redundant. Similar transformation can be observed in other media sectors, where citizen creators can now successfully compete with incumbents, thanks to democratized technologies, prompting massive reconfiguration of the sector organization and economics (Leyshon, 2009). Smaller players are empowered, allowing them to leverage strengths such as agility and customer focus to outperform their larger rivals and compete more successfully. As such, democratized technologies offer the potential to help address the SMTE digital divide by directly addressing each of the challenges discussed earlier.

First, most are low/no costs (or perhaps would better be described as lower cost), freeing businesses from the need for extensive capital outlay to start using them (Barton, 2012). In addition, instead of having to develop bespoke software or purchase expensive licenses, many have moved toward a software-as-a-service approach, allowing users to renting cloud-based applications on a periodic or per-use basis (Bayrak, 2013). Others use a Freemium approach, providing a limited but substantial set of functionalities for no cost in the hope that some users will subscribe to access advanced or premium features (Kim et al., 2018). Both Google Hotels and Google Analytics are examples of this approach, both of which allow SMTEs to use their functionality in a meaningful way for no cost and pay extra for more advanced features. Requiring minimal capital investments and having few ongoing operational costs, democratized technologies can thus help to address the financial resources challenge discussed above, putting advanced distribution functionality into the hands of SMTEs unable to afford traditional alternatives.

Second, democratized tools have also become less technical, simplifying the underlying expertise needed to exploit them successfully (Karlovitz, 2020). As a result, they can be used without advanced training or specialized knowledge, allowing “citizen” users to make use of advanced technology-based solutions (Panetta, 2020). For example, low-code/no-code platforms allow users to self-develop applications and/or websites using drag-and-drop, easy-to-understand interfaces. For example, web pages can be developed in WordPress without having to master HTML or other Web development languages, allowing non-technical users to create sophisticated Web presences. Similarly, online services such as Zapier or IFTTT can be used to develop automations involving integrations between different cloud-based systems without programming. And finally, intelligent agents and generative AI platforms such as ChatGPT can help non-technical users perform data analysis and interpretation, making data analytics accessible to a wider audience (Seger et al., 2023).

In short, the democratization of technology provides ubiquitous access to sophisticated functionality, empowering SMTEs hitherto overlooked by the digital revolution, helping to minimize the competence issue discussed earlier and allowing SMTEs to make more extensive use of distribution technologies to enhance their performance, resilience and agility (Stankovska et al., 2016). Thus, they help to diminish two of the key barriers to distribution functionality that have limited SMTEs in the past, allowing them to begin to exploit distribution technologies more easily and cheaply to both improve operational performance and strengthen their strategic position in the marketplace. While the technology may not be there yet, current market offerings represent important steppingstones that could help SMTEs gradually approach the functionality of their larger
peers (Stankovska et al., 2016). Today’s offerings comply with the classic pattern of disruptive technologies from The Innovator’s Dilemma (Christensen, 1997). When initially introduced, such tools typically are limited in scope and less than perfect, and thus dismissed by established players. However, they are typically “good enough” to get the job done, particularly when alternatives are expensive, requires extensive technical expertise and company’s lack the time/capacity to implement them (Capps, 2009). And, over time, such disruptive innovations gradually grow in power and sophistication, eventually eclipsing traditional systems and allowing users to better challenge their incumbents.

The key challenges remain that of managerial awareness, bandwidth and acceptability. While distribution technology is becoming more affordable and accessible, for the most part, it remains off the radar of the typical SMTE owner/manager, whose operational focus leaves them blissfully unaware of even their potential, not to mind how they might successfully be implemented. While this challenge might be addressed in the short run by education, training and awareness building, in the longer term, it will fade as younger, more digitally savvy, managers gain power in the sector. Having grown up as digital natives, the emerging generation of managers instinctively understands the power and potential of technology-based systems and is more likely to implement systems to aid in management and operations. And, in contrast to the top-down, centralized, one-size-fits-all, decision-making approach of the past, this adoption will be driven from the bottom-up, with lower-level managers adopting democratize, “good-enough” piecemeal solutions to improve their, and their business function’s performance (Andriole, 2022). While this introduces an additional set of challenges in terms of systems governance and integration, it would represent a significant step forward in terms of enhancing the attitude, digitization and competitiveness of SMTES, allowing them to at least start to compete on a level playing field with their technology-empowered peers.

4. Conclusions and a future research agenda

Democratized technology, a fundamental shift underway in how technology-based systems are designed, implemented and used, has the potential to address the digital divide that currently exists between SMTEs and larger tourism players in terms of successfully exploiting online and electronic distribution.

Technology transfer has long been shown to contribute to economic growth and poverty reduction, particularly in regions and sectors dominated by SMTEs (You et al., 2020). By putting better (or good-enough) solutions into the hands of SMTE managers and staff, democratized technology can enhance their distribution, improving performance, sustainability and profitability, leveling the distribution playing field and helping to build a sustainable future for SMTES, a key element of the Horizon 2050 agenda.

These performance improvements in SMTEs would in turn have a corresponding knock-on effect on the sustainability of destinations, regions and countries dependent on SMTEs. Improving SMTEs’ distribution through technological enhancement would enhance macro-level resilience and economic stability, contributing directly to the UN’s SDG 9 by helping to build a resilient infrastructure to help SMEs compete in the long term. Enhancing distribution for smaller players would help both increase profitability and build resilience at both the business and the destination levels. It would also contribute to SDGs 8 and 10 by promoting sustained inclusive and sustainable economic growth by reducing the power imbalance between SMTEs and large (peer and intermediate) companies.

In terms of a future research agenda, much work remains to be done in terms of understanding how to drive adoption of innovative technology by SMTEs, particularly in terms of overcoming the key challenges of managerial awareness and acceptance. Existing theoretical models of technology adoption (e.g. the technology adoption model or the technology–organization–environment framework) need to be adapted to take into account the peculiarities of this new paradigm. In particular, how best to integrate the
bottom-up, user needs-driven, distributed and almost free-spirited approach of democratized technology with the top-down, centralized and highly controlled approach typically used to manage technology within organizations, warrants exploration. Finally, because outcomes often differ from promises, the true effectiveness of democratized technology needs to be empirically evaluated in the context of the SMTEs, helping to empirically build the argument that, when it comes to using technology to drive more efficient and effective distribution, that good enough is good enough to improve SMTE performance and address decades-old competitive imbalances in the tourism sector.

References


Further reading


About the author

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