India's Travel Distribution Enters Its Value Era

As the industry reflects on the shift from volume-led to value-led growth, 2025 stands out as a turning point for travel distribution. Sandeep Dwivedi, Managing Director, Amadeus South Asia, traces the rise of modern airline retailing and AI-driven operations, and outlines the priorities shaping a more resilient and scalable travel ecosystem in 2026.

Prativa Vaidya Bhalla

From Amadeus' vantage point, 2025 was a year of maturity for India's travel sellers. Sandeep reflects, "Demand stayed strong, but agencies fundamentally changed how they serviced travel, moving beyond channel debates to outcome-driven distribution. They focused on accessing the right content across legacy and NDC while ensuring speed, servicing quality, and profitability. Importantly, several leading Indian players bucked the traditional adoption curve. Travel sellers such as MakeMyTrip, Cleartrip, Yatra, TBO, Riya, Akbar, and others moved early to scale NDC, treating it not as a disruption but as a strategic extension of their retail and servicing capabilities."

Agencies invested in automation, AI-assisted servicing, and tighter mid and back-office integration to handle higher volumes without increasing complexity. Efficiency and scalability became board-level priorities. Traveller expectations were the key catalyst. Indian travellers now expect richer choices, faster resolutions, and a more retail-like experience. Agencies that delivered transparency, personalisation, and dependable servicing pulled ahead.

Navigating Airline Retail Shift

As airlines accelerate toward dynamic offers and personalised retailing, Amadeus has focused on ensuring Indian travel sellers retain full content access, bringing NDC into the agency mainstream so agents can access its content of fare families, ancillaries, and branded offers alongside traditional workflows for transparent comparison and competitiveness. Democratising NDC adoption has been central to this effort. Beyond technology, Amadeus has invested in knowledge enablement through structured SharePoint repositories mapping airline-specific NDC capabilities, regular monthly webinars, and curated newsletters that track product evolution, servicing enhancements, and best practices, ensuring NDC is understood, not just available.

Sandeep candidly shares, "Gaps still exist, and one of the biggest industry challenges remains post-sales servicing. While offer creation has advanced rapidly, servicing journeys with changes, refunds, reissues, and disruption handling are still

▲ Sandeep Dwivedi

uneven. This is a key focus area for us, as agencies cannot scale modern retailing without confidence in servicing reliability."

Codeshare content remains a challenge, as complex Indian itineraries demand consistent availability, pricing transparency, and serviceability across mixed legacy–NDC environments. Amadeus' role is to bridge remaining gaps in end-to-end servicing, enabling travel sellers to scale modern retailing with clarity, confidence, and trust.

Tech Boosting Productivity

Looking ahead, Sandeep says, "From an adoption perspective, India is well-positioned. The technologies that will deliver the most significant productivity and revenue gains for Indian travel agencies are those that remove friction from everyday operations while enabling smarter retailing, conversational interfaces, and frictionless payments. Our focus at Amadeus is to help Indian travel sellers adopt these capabilities in a way that is practical, integrated, and commercially meaningful so that technology directly translates into growth. The highest adoption potential lies where these technologies are embedded directly into existing workflows rather than as standalone tools."

He predicts that AI-powered services and automation will have the most immediate impact. Intelligent case handling, automated refunds and exchanges, proactive disruption management, and AI-assisted workflows can significantly reduce handling time and cost per booking, enabling scalability for high-volume Indian agencies without extra manpower. Conversational, intent-led search and AI-driven interfaces are emerging as a strong revenue driver. Integrated payments and settlement solutions will also be key in 2026.

New Distribution Reality

The future is not about choosing channels but connecting them. In 2026, Amadeus sees the competitive landscape shifting towards ecosystems rather than traditional category boundaries. The strategy is to partner across this spectrum and deliver an open, multi-source, and connected platform that gives intermediaries access to all forms of content like EDIFACT, NDC, low-cost carriers, hotel and ground content, and fintech solutions in one seamless workflow.

The most essential collaborations will centre around NDC scalability, payments, AI-driven workflows, and richer hotel and ground mobility integrations. "By working with airlines, tech partners, and intermediaries, we aim to ensure consistent servicing, operational efficiency, and commercial competitiveness regardless of content source. In a fragmented world, our role is to unify the ecosystems, so agencies can focus on selling, not stitching systems together," asserts Sandeep.

Reimagining Distribution Governance

2026 should be about moving from growth at scale to trust at scale, affirms Sandeep. He adds, "In 2026, important structural priorities are stronger consumer protection, better credit-risk discipline, and clearer accountability across the distribution chain. Refund handling during disruptions needs time-bound, end-to-end clarity so travellers are not caught between airlines, agents, and payment flows. Tighter settlement and credit-risk frameworks are critical to prevent liquidity shocks from becoming consumer issues. High transparency standards, data protection, and cybersecurity compliance must become baseline operational requirements."