THE IMPACT OF OTA – TRANSFORMING CONTEMPORARY TOURISTS’ INTENTIONS

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Abstract

Modern hotel bookers claim to switch moods to the digital distribution model of hospitality services. A survey conducted in Bulgaria among frequent travellers reveal their attitudes when making a hotel room reservation. Taking into account the implementation of contemporary digital technologies in everyday life this article is observing the main distribution channels that are used in hotel industry. Compared are the preferences of the different age groups using a questionnaire distributed among them. Online Travel Agencies (OTA) platforms and hotels both compete and collaborate to attract customers in the worldwide web. The results of the survey reveal an ongoing process of digitalization even in sectors highly dependent on human capital. The need for remodelling market strategies of travel companies and adjusting their business performance while taking into account the trends and expectations of consumers is visible. Digitalization of the hotel reservation process in Bulgaria and the domination of Booking.com as a leading OTA confirms the fact that the domestic hotel sector follows modern world tendencies.

Keywords: OTA, hotel, reservation, Booking.com

JEL Codes: D12, G41, Z30, Z33

Introduction

The increasingly digital environment where hotel services are presented and distributed nowadays exerted a serious influence on the economic performance of hotel enterprises. According to Berne, Garcia-Gonzalez & Mugica (2012) distributors who use ICT (information and communication technologies) to create their product as expected by consumers will be able to increase their influence and market power. They will gain a more central position, thus taking away influence from other market participants (Lowe, Williams, Shaw & Cudworth, 2012). End users are changing their shopping and hotel reservations habits, and in this study, we try to identify the new trends and habits of frequent traveller’s hotel service booking preferences in Bulgaria.

Hotel managers are facing the complex but sometimes very obvious decision where and how to deploy their inventory in the contemporary business environment. In order to maximize profits of their companies within the current market mechanism it is easy to find the best located and reputable online travel agents who are ready to promote and advertise hotel product. The increasing transaction volumes through OTA’s electronic platforms reveal their influence and the major role of online consumer reviews regarding hotel services. Online reviews published on both specialized sites such as TripAdvisor and OTA websites are becoming an important aspect of research in marketing, e-commerce and e-tourism (Filieri & McLeay, 2013). Therefore, these reviews are playing the role of a significant measurement tool in the hands of

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hotel managers to evaluate their performance in the aspect of consumer opinions both on a global scale and in Bulgaria.

The tendencies and habits of the changing approaches to the process of making a hotel reservation are considered to point out the digital dependence and the constant online inclusion of Bulgarian frequent travellers and hotel bookers to reveal their consumer preferences, strongly impacted by OTA.

1. Literature review

Many hospitality professionals believe that in order to be efficient and competitive, their business must be constantly digitally connected to Computer Reservation Systems (CRS), including Global Distribution Systems (GDS) (Kotler, Bowens & Makens, 2014). Berne et al. (2012) demonstrate that the use of changes in the balance of market forces generated by Information and Communications Technologies ICTs depends on the market structure and more precisely the number of participants, size, concentration and integration of distributors and consumers, and not so much on the structure of the distribution channel itself. Online travel agencies are taking advantage of the digital technologies and occupy important online distribution channels targeting large numbers of potential consumers and tourists.

Many studies in the field of hotel accommodation point out the leaders among Online Travel Agencies (OTA) such as Expedia group and Booking Holdings, holding the main share of sales and preferences of travellers in many countries, a fact outlined in research by Schegg (2018), Mellinas (2019), European Commission (2017), Bonazzi & Schegg (2016), Martin-Fuentes & Mellinas (2018) and many others. Online travel agencies play a key role in the hotel services sector (Kim, Kim & Shin, 2009) and gradually online distribution channels have become a traditional way of organizing travel (Law, Chan, & Goh, 2007). Moreover, the hotel sector is witnessing the widespread use of OTA, both by travellers and hoteliers. In their study, Inversini & Masiero (2014, p. 8) found that 79,4% of the reservations are made online or through an intermediary (OTA, traditional tour operator, email, reservation through the hotel website) and only 20.6% of the reservations are traditional such as by phone, on site, fax, letter, etc. Some business models of online travel agents and smart business practices, considering the formation of the price, promoted the opportunity for the OTAs to offer better price deals than even hotels do on their websites (Gazzoli, Kim & Palakurthi, 2008).

In addition, reputation is crucial for building a relationship with customers before the consumption process (Pera & Viglia, 2016). Online reviews have a tremendous impact on consumer opinion. The high level of trust in online reviews (Gretzel & Yoo, 2008; Fotis, Buhalis & Rossides, 2012) can affect overnight sales (Ye, Law & Gu, 2009; Vermeulen & Seegers, 2009) and act as an enhancer of tourist confidence, thus reducing the risk associated with booking accommodation (Gretzel, Yoo & Purifoy, 2007). In 2010, the European Travel Commission issued guidelines and recommendations that hotels should take action to increase their online interaction with their customers. Although positive comments on social media can improve consumer attitudes toward hotels (Vermeulen & Seegers, 2009), the hotel industry continues to find it difficult to introduce online interaction tools in their communication (Dwivedi, Rana, Chen & Williams, 2011).

Mellinas (2019) examines the relationship between the number of reviews and the share of reservations made through OTA platforms. This way, approximate information is obtained about the market share of each online travel agent in the distribution matrix of every hotel surveyed. The present study is not addressing hotels or OTA platforms but concentrates on the client directly, outlining his preferences for booking a hotel room in Bulgaria.
2. Research methodology and results

2.1. Methodology

For the purpose of the study, an online and quantitative survey was conducted among 150 frequently traveling Bulgarian citizens over the age of 17. Similar studies have been conducted by Inversini & Masiero (2014), Schegg, Stangl, Fux & Inversini (2013), Stangl, Inversini & Schegg (2016) and Schegg (2018), but they are all addressed to hotel sales, while the current study is aimed at consumer behaviour and habits of tourists. Correlation coefficients are derived for some pairs of variables.

The survey was conducted in January 2020 and on the basis of data obtained through descriptive statistics reveals the behaviour of traveling and hotel booking Bulgarian consumers, and highlights the most commonly used „channels” for reservations and sales of hotel reservations and the most influential online booking platforms. The respondents are divided into age groups as follows: 17 to 30 years old, 31 - 44 years old, 45 - 58 years old and people over 58 years. The age groups represent the respective generations. Out of 150 completed questionnaires for the respective questions, the following number of answers was reported: question 1 „What is the main reason why you book a hotel in Bulgaria” - 147 answers; Question 2 „How do you usually book a hotel room?” and the related question 3 „Why do you prefer this type of reservation?” in 147 answers; Question 4 „Which online travel agent do you use most often?” and Question 5 „Why do you prefer this online booking agent?” with 137 answers; Question 6 „Are you looking for reviews on the Internet about the hotels you book?” - 146 answers. The obtained results are processed with Microsoft Excel, version 2010 and tables and diagrams are compiled in order to more clearly present the results of the empirical study.

2.2. Results

Exploring and studying the consumer attitudes and habits of Bulgarian tourists using questionnaires can be presented through a rich set of econometric tools and in this case, we use descriptive statistics. In order to segment the answers of the respondents who participated in the survey, we use two main factors: the purpose of travel and the age of the person who makes a booking, formed in four age groups. The main part of the interviewee’s states „pleasure or rest” as the reason for booking a hotel room - 78.9%, the share of tourists booking for „business travel” is 19%, while the remaining 2.1% are booking for travel related to „hobby or sport”. It is noteworthy that 60.71% of the segmented in the group „I travel for work” prefer to book by phone and only 25% through an online travel agent. In the large group of travellers for leisure and enjoyment, the distribution is quite different as only 34.18% of them book by phone, while 44.44% of them use online booking platforms of travel agents such as Booking.com, Airbnb, Trivago, and 10.26% remain for reservations through the hotel’s website or email. Only 7.69% of the reservations are made with the assistance of a standard tour operator. Respondents traveling for „sport or hobby” are small in number and cannot provide a correct distribution of their preferences in the booking process.

The empirical results of the survey show some preferences of traveling Bulgarians and the most commonly used way to book a room in Bulgaria - the use of online travel agent (OTA) can be brought to the fore with 41.78% of all respondents preferring this type of reservation. On the second position, although with a small difference, remain the reservations by phone with a share of 38.36%, outlining the two main approaches when booking hotel rooms. In the background are reservations via email or the website of the hotel with 8.22% and reservations through traditional travel agents or tour operators with 6.85%. Several respondents also shared other ways of booking, such as „friends help me book a hotel room” and „my company booked me a room”.
Table 1. Type of reservations, according to the distribution channel

| Type of reservation according to the distribution channel | Percentage |
|-----------------------------------------------------------|------------|
| Offline reservations                                      | 47.26%     |
| Online reservations                                       | 52.74%     |
| Direct reservations                                       | 46.58%     |
| Indirect (through an intermediary) reservations           | 53.42%     |

Source: Author's research

There is a slight prevalence in the volume of online reservations compared to the traditional offline methods used for booking hotel rooms. This fact underscores the penetration of digital preferences in shopping and booking tourist services and reveals the increasingly transforming economic environment, both globally and locally. Direct bookings also lag behind those made through an intermediary, be it online or offline travel intermediary, confirming the validity today of the process of intermediation in the hotel business. At the turn of the century, disintermediation was identified as a threat to e-travel agents by Buhalís & Licata (2001), but in fact it now appears that the digital transformation in the sector creates opportunities for development and control of an increasing share of sales of hotel services via E-mediators. Further in the survey follows the question „Which online travel agent do you use most often?” and we find the expected favourite and leader of the European market, and as noted by Schegg (2018): „Booking.com is the most influential OTA with a share of 66.4%”. In the study we present the following results in the figure below:

Figure 1. Preferred Online Travel Agent in Bulgaria

Source: Author's research

Booking.com covers 70.45% of the respondents' preferences, leaving behind „Trivago” with 9%, „Airbnb” with 7% share and the local online travel agent „Pochivka.bg” with 6%. To make the data more accurate, the distribution of preferences by age groups is presented as follows in the figure below.
There is a growing share of Booking.com among younger age groups, with almost 80% of 17-30 years olds using this online platform for hotel reservations.

In order to disseminate and distribute the preferred approaches for booking a hotel room according to age, we have prepared the following figure based on question 2 „How do you usually book a hotel room?” from the survey:

**Figure 2. OTA preferences by age group**

|          | Airbnb | Booking.com | Hotels.com | Trivago | Pochivka.bg | Tripadvisor |
|----------|--------|-------------|------------|---------|-------------|-------------|
| over 58  | 0%     | 44%         | 0%         | 44%     | 0%          | 0%          |
| 45-58    | 4%     | 58%         | 8%         | 4%      | 21%         | 4%          |
| 31-44    | 8%     | 75%         | 0%         | 8%      | 3%          | 4%          |
| 17-30    | 7%     | 79%         | 7%         | 3%      | 3%          | 0%          |

**Source: Author’s research**

**Figure 3. Hotel room reservation preferences according age**

|          | OTA   | Directly phone | Traditional travel agent | Email or website |
|----------|-------|----------------|--------------------------|------------------|
| 17-30    | 48%   | 41%            | 3%                       | 3%               |
| 31-44    | 47%   | 34%            | 5%                       | 12%              |
| 45-58    | 28%   | 47%            | 9%                       | 6%               |
| over 58  | 21%   | 50%            | 14%                      | 0%               |

**Source: Author’s research**
The growing role of online travel agents and the preference of younger generations of Bulgarians for them is evident in the presented data, while on the opposite side are the traditional tour operators and travel agents, left in the background by young people.

Following the sequence of the survey and in connection with the previous question we come to Question 3 „Why do you prefer this type of reservation?”. The following features of the choice are found: 46.9% of respondents prefer their chosen method of booking because it is „The most convenient and fast”, respectively 67.14% of those who show this preference use the online platform of Booking.com for reservations. The next reason for the preferences of modern tourists in Bulgaria is the fact that they feel this technique as „Safest and hassle-free”, with 58.82% using Booking.com. When it comes to „That's how I get the best price” Booking.com is the preference of half of those looking for a good price. In general, we can say that the price is not the leading factor in making a reservation, while convenience, speed and security are factors which turn out to be more important than the price level of the offered tourist services. The data presented so far give a strong preference to online travel agents and specifically to the Dutch-based internet portal Booking.com. These modern trends are visible in the „Google Travel study“ (Vidal, 2019), which found that 74% of travellers plan their vacation online and only 13% of tourists continue to use traditional tour operators and travel agents. Trying to find the relationships between the age group of tourists and their preferences and techniques in the booking process, we calculate the linear correlation, using the Pearson coefficient - r, to reveal the following numerical expressions and dependencies: The data presented so far give a strong preference to online travel agents and specifically to the Dutch-based internet portal Booking.com. These modern trends are visible in the „Google Travel study“ (Vidal, 2019), which found that 74% of travellers plan their vacation online and only 13% of tourists continue to use traditional tour operators and travel agents. Trying to find the relationships between the age group of tourists and their preferences and techniques in the booking process, we calculate the linear correlation, using the Pearson coefficient - r, to reveal the following numerical expressions and dependencies:

Table 2. Pearson linear correlation coefficient

| Pairs of variables: age - type of reservation, age - preferred OTA | Pearson - r | Strength and direction of relationship |
|---------------------------------------------------------------|-------------|----------------------------------------|
| Age group - reservation through OTA                           | -0.951      | Very strong, negative relation         |
| Age group - reservation by phone                               | 0.723       | Strong, positive relationship          |
| Age group - reservation using traditional travel agency        | 0.991       | Very strong, positive dependence       |
| Age group - reservation by email or website                    | -0.444      | Moderate, negative relation            |
| Age group - Booking.com                                        | -0.985      | Very strong, negative relation         |
| Age group - Airbnb                                             | -0.889      | Very strong, negative relation         |

Source: Author’s research

There is a strong and visible trend related to the dependence between the age group of tourists and their choice of booking approach and online travel agent. The strong and even very strong correlation is indicative, while in terms of reservations by email or via the hotel’s website we do not observe a serious dependence on the age of the bookers. We can note that due to the insufficient number of respondents we cannot accept these data as representative. This fact is the main limitation for the accuracy and validity of the study.
The answers of question 5 „Why do you prefer this online booking agent?” are not limited to a single choice and give several answer options, the most frequently repeated answer is „I can check the reviews of previous guests“ with 61 answers. A large number of favourites are given to „This is how I get the best price“ - 46, „It is reliable and secure“ - 45 answers and „I can compare several hotels in the destination where I am looking for accommodation“ with 40 preferences.

Question 6 „Are you looking for reviews on the Internet for the hotels you book?” gives the following optional answers: „Always search on Booking.com” with 31.51%, „Sometimes I search, sometimes not“ with 23.30%, „I look for information in different online platforms - TripAdvisor, Google, Booking.com“ with 39.73% and „I do not check hotels for reviews on the Internet at all” with 5.48%. The two options involving searching for reviews on online platforms and specifically on Booking.com collect a total of over 70% of preferences, as half of those looking for information on different online platforms actually book directly by phone, and 1/3 of those using Booking.com for information also book hotel services by phone. This feature of the booking process reveals that often the consumers use multi-channel information gathering before resorting to a certain distribution channel where to book a hotel product. This is point where a modern shopping phenomenon called „cross-channel free-riding“ (Chiou, Wu, & Chou, 2012; Chui, Hsieh, Roan, Tseng & Hsieh, 2011; Starkov & Price, 2007; Van Baal & Dach, 2005) is observed or literally translated as „free travel through distribution channels“. This recent consumer behaviour is the acquisition of free information about the products and services they wish to obtain or use, followed by a purchase through the most convenient and inexpensive channel, seller or manufacturer. An example can be given when a user „likes“ a hotel in a destination and after checking the prices on the Internet makes a direct reservation by phone, a move that saves costs for the expense of time used for „market research“. According to Chevalier (2002), this phenomenon is associated with increased use of the Internet, while Heitz-Spahn (2013) emphasizes that added value is gained in the context of multichannel trading.

3. Discussion

The outlined approximate parity between the reservations through digital channels and the traditional ones is impaired by the increasing preferences of the younger generations in Bulgaria. The fact is that Generation “Y” - Millennials, currently in its active age, dictates the trends in the development of the hotel business in Bulgaria with its ability to collect and use information quickly, accurately and online. There is a visible trend that turns online travel agents into a major driving force in the digital market worldwide and in our country as a special case. The timely provision of relevant and rich information is identified as a major factor in the differentiation of the online market and directs the modern consumer more and more to the daily use of the services of companies in the online tourism sector. At the same time, traditional electronic channels for selling hotel products and services are disappearing in the background. The study rediscovers the market leader for online reservations in the face of Booking.com, holding a very significant share compared to other OTAs selling hotel services as intermediaries in Bulgaria. The influence of the Dutch rooted online travel agent is so strong that it brings the market situation in the field of OTA business closer to a monopoly. Since the beginning of the century there was a clear pathway opened for the entry of OTAs, according to some authors, and the growing role of online travel agents in the modern hotel product market was established by factors that emerged like the widespread use of the Internet and the creation and imposition of brands who inspire confidence in the consumers. To illustrate vividly the contemporary state of art and future expectations for the tourist products and services market is used a figure of Law, Leung, Lo, Leung & Fong (2015) as seen below:
The opinion of Law et al. (2015) shows that internet travel agents are in a level playing field and are gradually increasing their influence at the expense of traditional travel agents, which in turn stimulates the traditional travel agent to invest and enter the online market of modern e-travel agents. New e-travel agents still need to make efforts to develop cooperation with hotel product suppliers and to offer the best to clients through a system of online platforms. There has been a concentration of capital and resources in several major e-hotel providers such as Booking.com and Expedia, as well as the formation of collaborations and alliances (Ctrip is collaborating with Booking.com to be able to go beyond the Asian market, as well as the US platform to take place in Asia, through its Chinese partner). In this way, costs are minimized and commissions are increased, which is a catalyst for the rapid growth of online sales in the hotel sector. The number of online travel agents is increasing daily as several larger companies hold the main market in the world and are in an almost monopoly position, namely Booking Holdings (formerly Priceline) and Expedia, through their OTA branches and meta search engines, while other digital travel agents are emerging as regionally important agents such as Ctrip in China and Travel.ru in Russia. The main players Booking Holdings and Expedia Group have conquered the market of online travel agencies with a share of 83% of all hotel sales via OTA in Europe in 2017 (Schegg, 2018). The annual report of Phocuswright (2020), regarding the OTA market in the US reveals that Expedia and Booking.com retain a total share of 92% of all bookings on the market of online travel agencies, which is indicative of the huge market power and influence of these two companies on the market situation in this segment of tourism. According to Buhalis and Licata (2001), new e-intermediaries will inevitably go through a process of natural selection that will separate the stronger players - those with sound business models, stability and expansion - from those who fail. The probability of finding and placing in the right niche and the formation of partnerships, filling market needs and image will be an essential factor for the development of online distributors of hotel reservations. Interestingly, customers tend to be more loyal to OTA than to the brand of the provider itself - this is explained by greater security in payments, options for selection and filtering criteria that OTAs provide (Green & Lomanno, 2014). When consumers buy a tourism product or service from OTA, they expect to receive value, loyalty and quality services (Bizirgianni & Dionysopoulou, 2013).
4. Conclusion and Recommendations

The change in consumer sentiment in the field of tourism and hospitality, and their digital transformation is inevitable in today’s conjuncture. Bulgarians follow the global trend of an ever-increasing digitally connected world and technology as a part of everyday life. Along with new technologies, tourism enterprises and hotels in particular are being transformed, which is changing their strategies for development and operational management practices, turning them into consumer-oriented tourism organizations. From the point of view of consumer preferences, their competitiveness increasingly depends on their ability to use ICT strategically and tactically in order to improve their positioning in the preferences of the client. The Internet and ICT are making a difference in the tourism by converting companies in the sector from product-oriented to consumer-oriented. Based on the obtained data and the analysis of the results, the present study outlines the specifics of the local tourist market in Bulgaria, considering the behaviour and habits of tourists in the reservation process, and taking into account the possible behavioural characteristics of the hotel companies to achieve business benefits and success. The conducted research can serve as a basis for future more serious and in-depth study of the trends in the country’s hotel business. The collected data are a rich source of information, regardless of their limitations in terms of representation and are a serious starting point for studying the consumer habits of consumers in the tourism sector in Bulgaria. Information about these preferences is a serious starting point for the direction in which modern hotel managers should steer their marketing efforts. Knowledge of the preferences of young generations of tourists shows the digital transformation in the sector and motivates those working in the sector to rethink the way they need to offer and sell their product. The small number of reservations made through own web channels (email and website) of the hotels in Bulgaria show the direction, in which it is necessary to focus the efforts of hotel managers in order to diversify the sources of reservations and sales. The information generated by the study is valuable and would stimulate the adaptation of tourism resources at a micro and macro level related to the individual wishes and demands of tourists to ensure the improvement of their satisfaction with hotel services and to guarantee a process of fair distribution of resources among participants on the market of tourist services in Bulgaria.
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