

## **PROJECTIONS OF DIGITALIZATION ON HOTEL ATTITUDE AND BOOKING INTENTIONS ON THE DOMESTIC TOURIST MARKET IN BULGARIA**

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### **Abstract**

**Purpose** – The online presence is an essential prerequisite for the success of the travel companies and remodelling is needed to meet the expectations and attitudes of tourists while taking advantage of new technologies. Considering the course of these processes in the travel industry, this study focuses on Bulgaria and aims to determine how digitalization influences the attitudes of domestic travellers when booking a trip.

**Design** – The research paper comprises of two methods of analysis and overview of the ongoing processes of digital transformation in the industry of hospitality.

**Methodology** –SWOT analysis and descriptive statistics are used in an attempt to detect the main trends and behavioural patterns of Bulgarian domestic travellers.

**Approach** – A survey is distributed among active travellers to understand the most common hotel reservation preferences and practices of Bulgarian tourists.

**Findings** – Revealed is a picture of relative parity of the online and offline reservations in Bulgaria. The respondents of the survey vote in favour of the digital distribution channels but interpreted through the prism of age groups, traditional preferences of tourists are still holding their share. The hospitality sector in Bulgaria is dominated by the leading OTA on the European market.

**The originality of the research** – The research combines two analyses to show the importance of customer preferences for shaping the requirements of the Bulgarian hospitality market and uncovering some weaknesses which slow down the mass digitalization.

**Keywords** Digital transformation, information, hotels, OTA, domestic traveller, attitude

### **INTRODUCTION**

The global system of worldwide interconnected computers or as we call it the Internet was defined by Hoffman in 2000 as the most important innovation since the development of the printing press (Hoffman, 2000). By 2019, the number of internet users globally reached 4 536 248 808 (World internet usage and population statistics, 2019) using it for work, study, communication, entertainment and shopping. These data show an increase of 1157 % since 2000 and represents 58.8 % of the world's population. Particularly interesting is the finding that over 90% of people between the ages of 5 and 17 use the Internet regularly (Turban, Lee, King, McKey & Marshall, 2008), thus emerges the name they obtained - "digital native" (Measuring the Information Society, 2013). These young people are more familiar with the internet than other media such as radio and television. Being into their active age they establish the internet as the most influential media in the field of business relations.

Travel planning – a process of searching information about travel approaches, tourist destinations and attractions, as well as booking a trip, have permanently and categorically transferred to the digital space as a consequence of the advent of the internet. The digitalization in tourism is directly related to the creation of travel software programs aiming to fill the information gaps acquired in the form of photos and articles. Upgrading them to a three-dimensional model of a tourist destination that tourists would desire to visit or explore, advising them with the means of artificial intelligence what to do in this destination, and provoking a new type of individualized experience by transferring the tourists into a new virtual reality. As a result in the industry of tourism, a profound transformation process is underway (Buhalis, 2004; Buhalis & Law, 2008; Poon, 1993; Werthner & Klein, 1999), initiating the transition from traditional information sharing approaches to the new systems of the information society and transforming it as one of the most successful e-commerce implementation (Turban & al., 2008).

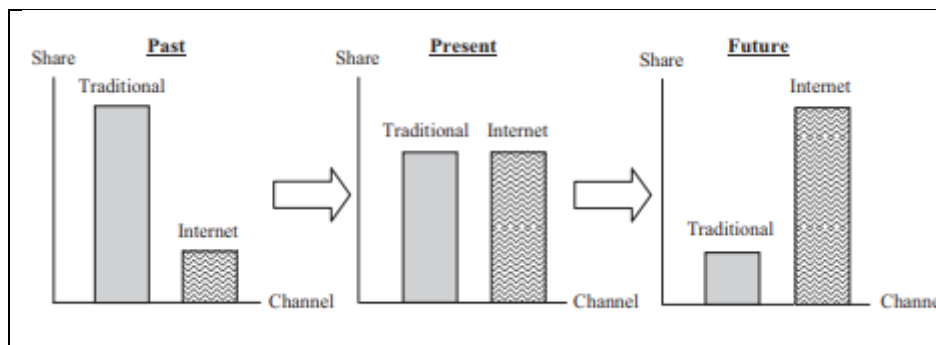
## LITERATURE REVIEW

Travellers are increasingly dependent and reliant on information content on the Internet as a consequence of the information-intensive characteristics of tourism products. Tourism products are usually intangible, inseparable, heterogeneous and perishable (Flipo, 1988; Ribov, 1992; Edgett & Parkinson, 1993; Mattila, 2001) and in the scope of time, the process of buying them is usually happening far ahead of the actual consumption in the travel destination. The impacts of ICTs have mainly resulted from websites, social media, and mobile technologies, which are important channels allowing industry practitioners to reach their customers (Leung et al., 2013; Sotiriadis, 2017; Law, Chan & Wang, 2018). In the pursuit to reduce risk, consumers seek as much information as possible to help them form knowledge for the product they plan to consume or the destination they reckon to visit. Internet is the tool of all travelling consumers to achieve immediate and comfortable access to a diverse and large in volume information. The global web grants consumers the advantage to buy travel services online in direct contact with the suppliers of the tourist product according to Hashim, Ismail, Awang & Safri (2014). Hence the online presence is an essential prerequisite for the success of any business on a global scale. Economic growth and development of IT technologies stimulated growing demand among international users of travel services (Wei-Lin & Hsin-Pin, 2012). Travel organizations and tourism-related companies are forced to undergo a major process of remodelling to meet the expectations and attitudes of potential and actual tourists while taking advantage of new technologies.

The process of digitalization represents the undergoing change inside the sector. Xiang, & Fesenmaier (2017) set 3 phases in the process of digital transformation of tourism as follows: Phase 1 - "Sales and marketing" from 1990 until 2000 – paper-based marketing tools being replaced by websites, online content, emails, etc.; Phase 2 - "Digital business ecosystems" from 2000 until 2010 – PMS, Smartphones, Online booking systems, Customer relationship systems emerged.; Phase 3 – "Integration of systems" since 2010 – cloud computing, virtual reality, mobile technology, GPS, Social media, Review websites and others. These innovations created new opportunities for the facilitation of the modern business in the field of tourism and consequently accelerated the global reach of travel companies.

Considering the course of these long-lasting processes in the travel industry, this study focuses on Bulgaria and aims to determine how digitalization influences the attitudes of domestic travellers when booking a trip. In this perspective, opportunities are also sought after to create prerequisites using the online information network for improving the quality of travel product and its access facilitation. One of the main drivers of development and progress turned out to be the online travel agencies – OTAs. When the first OTA emerged in 1994 on the newly constructed world web many tourists were avoiding it according to Olenski (2015). The present state of the art and the expectations about the future of the hospitality market globally are illustrated by Law, Leung, Lo, Leung and Fong (2015) below:

Figure 1: Transformation of the share of hotel and travel reservations (past, present and future)



Source: (Law & al., 2015)

This figure makes evident that Law and co-authors (2015) are supporting the current picture of parity between traditional and internet channels of distribution of hotel and travel reservations. Their expectations are revealing a forthcoming prevalence of the internet and the current research is conducted to verify or revise these statements in the particular case of the Bulgarian hotel sector.

## METHODOLOGY

A complex study is conducted to reveal the manifestations of the digital transformation in tourism. Using the techniques of deduction, from the general development of trends in digitalization in the tourism industry, specific logical conclusions are drawn regarding their manifestation on the domestic tourist market in Bulgaria. SWOT analysis is provided to make visible the digital transformation in tourism with a focus on the opportunities, potential threats and constraints affecting the unfolding of digitalization trends in the specifics of Bulgaria, assuming that the digital sources of information are enhancing the knowledge of the contemporary consumer in the tourism industry. SWOT analysis is a subjective analysis that is used as a popular tool for assessing the impacts and trends for future development (Drucker, 2004). A quantitative survey through an online poll open to a representative audience is also conducted to achieve the required depth of study. Similar studies are conducted by Inversini & Masiero (2014), Schegg,

Stangl, Fux & Inversini (2013), Stangl, Inversini & Schegg (2016) and Schegg (2018) but all of them addressing the hotel sales and not the habits and attitudes of the consumers of travel product. Another interesting and valuable study of Melinas (2017) engages RpR – reviews per room to calculate the approximate share of Booking.com as leading OTA on the Spanish hotel market.

Survey poll and descriptive statistics are conducted to explore the attitude of Bulgarian travellers aiming to distinguish the most often used channels for hotel room reservation and the most influential online travel platforms. The survey is distributed among active travellers (1-15 January 2020) sorted in age groups as follows: 17 to 30 years old, 31 - 44, 45 - 58 and above 58. Groups represent different generations to reveal their specific character and preferences when booking a hotel. There are 150 completed questionnaires and the two pillar questions are answered by 149 people as follows: Question 1: “How do you book hotel room” is complete with 149 answers, while Question 2: “Which is the main online travel agent you use?” has 133 valid answers and 16 missing – unanswered surveys. The options to choose from for Question 1 are: “Phone call booking”, “I book hotel room through OTA platform”, “I book on the website or email of hotel”, “I book in a group shopping portal”, “I use a traditional travel agent”, and option “other:” which respondents fill with specific preferences, in this case – “I used all types of reservations”, “Friends help me find a room” and “My company books a room”. As for Question 2 respondents can choose among “Airbnb”, “Booking.com”, “Grabo.bg”, “Hotels.com”, “Pochivka.bg”, “Tripadvisor”, “Trivago” and the option “other:” left for respondents to evince their preferred OTA. Frequency per cent for every mode of hotel booking and for every preferred OTA is calculated using “Microsoft Excel 2010”, also tables and charts are cumulated statistically to order and reveal the results of this empirical study.

## **RESEARCH RESULTS**

The focus is set on providing information and creating knowledge source for the tourist-consumer regarding the travel product. The four groups of factors (S, W, O, T) are presented as a basis estimating (Thomson, 1997) the dynamics of the real dimensions of the transformation process in tourism in the digital environment.

Table 1: Generalized SWOT analysis in relation to digital transformation in tourism

		Internal factors	
		Strengths	Weaknesses
External factors	Opportunities	<ul style="list-style-type: none"> <li>• Finding clients and/or suppliers worldwide;</li> <li>• Reducing the cost of information processing, storage and distribution;</li> <li>• Reduce delays and costs by improving the supply chain;</li> <li>• 24/7 service in the absence of additional costs; Low communication costs; Customizing the service at a reasonable price and improving customer service through direct interactions with them;</li> <li>• Facilitate innovation and develop unique business models;</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of capital to buy hardware and software;</li> <li>• Lack of standardization and professionalism;</li> <li>• Insufficient marketing and technological preparation;</li> <li>• Insufficient capabilities of the tourist organization for keeping up-to-date information intended for the formation of travel knowledge among consumers-tourists (potential and real);</li> <li>• Saturation behaviour and depletion of resources, resources, opportunity;</li> </ul>
	Threats	<ul style="list-style-type: none"> <li>• No return on investments;</li> <li>• Profit loss due to the insufficient number of sellers and buyers needed to reach the required sales volume;</li> <li>• Pull back of clients due to lack of trust in transactions and transactions without the presence of an official paper document;</li> <li>• Existence of national and international government regulations that are hard to perform (especially for smaller organizations);</li> <li>• Increased risk of online fraud;</li> </ul>	<ul style="list-style-type: none"> <li>• Prolonging development of the software toolkit, the need for periodic updates associated with additional costs;</li> <li>• Difficulties in integrating updated and sufficient volume of information simultaneously into all communication channels and databases in use;</li> <li>• Customer backup regarding online shopping security and privacy;</li> <li>• Incomplete political, legal and tax framework in relation to e-commerce;</li> <li>• Lack of universal standards for quality, security and reliability and the risk of online fraud;</li> </ul>

Source: author

A total of 20 factors have been identified, taking into account the most extensive generalized impacts. Five factors are derived in each quadrant of a table systematized matrix. The difficulty, in this case, stems from a wide range of matter, which makes it difficult to limit the factors to five. In this sense, there is no difference between the number of internal and external factors that determine the characteristics and development of the explored phenomenon. More significant is the identification by conducting a SWOT analysis of the approaches through which strengths could counter threats/opportunities and weaknesses can be overcome by improving the conditions/tools

of the digital environment in tourism, all these engaged to identify the opportunities and threats that may arise in the future (Kulakoğlu, Kızılırmak & Dilek, 2018).

The empirical results from the conducted survey are revealing the habits of Bulgarian travellers throughout the process of a hotel room reservation. The most frequently chosen way of reservation of hotel room is the use of an online travel agency with a share of 41.78% of all respondents, a fact that draws attention to the increasing influence of digitalization in hospitality while second, is “direct reservation over the phone” with 38.36%. Direct reservation by email or website of the hotel is the preferred method for 8.22% of the respondents and 6.85% of them are going for the traditional “brick and mortar” travel agent. A few answers come as: “friends help me to find a room” or “my company books a room for me”. As the respondents of our survey are not distributed equally across age groups we calculate weighted percentages having in mind that about 35% of the population above the age of 17 in Bulgaria is over 58 years old (NSI, 2020)

Table 2: **Online vs Offline reservation channels**

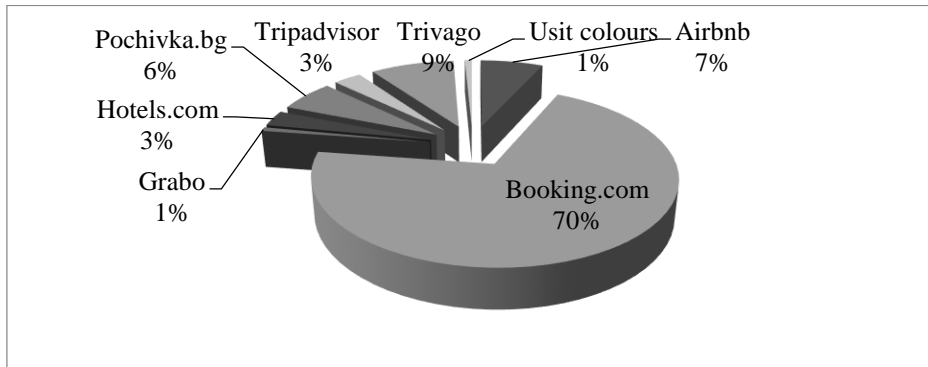
Type of reservation channel	Survey results (%)	Results assuming equal weights of age groups (%)	Results assuming weights of demographic structure of Bulgaria
<b>Offline reservations</b>	<b>47.26%</b>	<b>54.49%</b>	<b>57.09%</b>
<b>Online reservations</b>	<b>52.74%</b>	<b>45.51%</b>	<b>42.91%</b>

Source: own research

This research shows a slight prevalence of online reservations over offline when assuming numbers from the conducted survey, underlining the upcoming digital trends of transforming hospitality transactions onto the global web. Visible is that digital technologies in hospitality have overcome the break-even point of parity with offline sources and according to Phocuswright (2020) more than half of all travel bookings in Europe were processed online in 2019. On the contrary, if results are weighted according to the demographic structure of Bulgaria or assuming equal sizes of each age group the picture changes – offline is still prevalent in Bulgaria. Direct reservations are also lagging behind indirect reservations but still staying close, a fact that reveals the process of intermediation being valid for the present state of the art of the hospitality business. Disintermediation once pointed by Buhalis and Licata (2001) as a threat for the traditional electronic intermediaries is now an opportunity for the new “e-mediaries” to control a large share of sales in the sector of hospitality.

Further by checking the results from Question 2 “Which is your preferred OTA” outcomes the expected leader on the European market - „Booking.com is by far the most influential OTA, with a share of 66,4%” (Schegg, 2018).

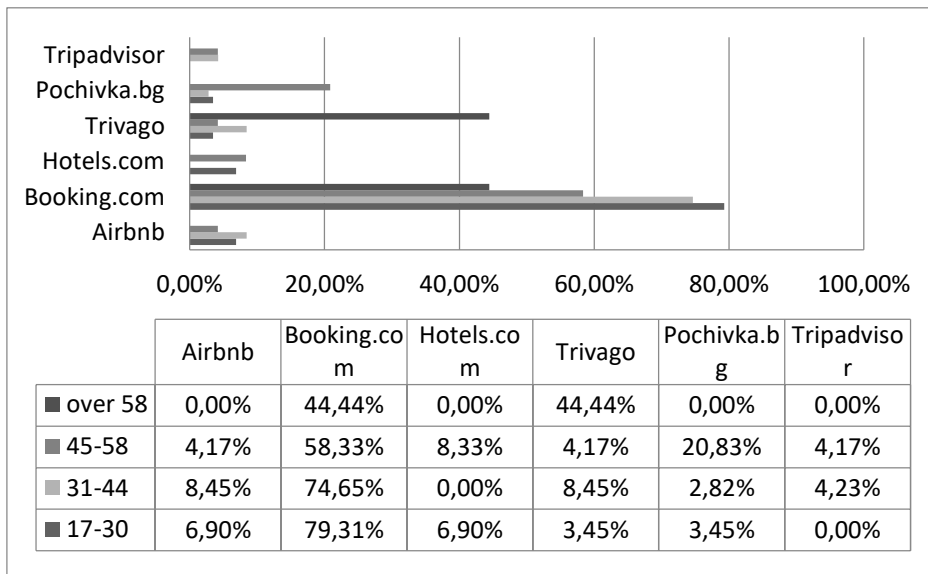
Figure 2: OTA preferences in Bulgaria



Source: own research

Booking.com grabs 70.45% share of the preferences of respondents with “Trivago”, “Airbnb” and “Pochivka.bg” far behind. To specify the distribution of preferences by age group the results are disseminated as follows in the table below:

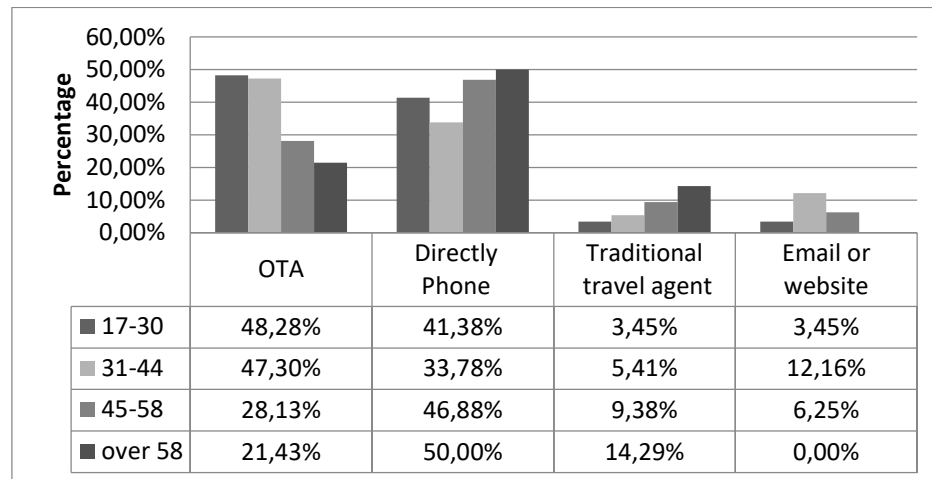
Table 3: OTA preferences by age group



Source: own research

The increasing role of OTA for younger generations is disclosed in the numbers of table 4 while the traditional travel agent regresses in the minds of upcoming generations. It is also particularly significant, as seen in the Google Travel study (Vidal, 2019) that 74% of travellers plan their travel online, and only 13% continue to use traditional travel agency services.

Table 4: **Hotel room reservation preferences according to age.**



Source: own research

Trying to find the relationship between changing age and preferences of each age group Pearson linear correlation coefficient –  $r$  is calculated:

Table 5: **Linear Correlation between variables**

Pairs of variables	Pearson – $r$	Strength and direction of relationship
Age – OTA reservation	-0.951	Very strong, negative
Age – phone reservation	0.723	Strong, positive
Age – traditional travel agent	0.991	Very strong, positive
Age – email(website) reservation	-0.444	Moderate, negative
Age – Booking.com,	-0.985	Very strong, negative
Age – Airbnb	-0.889	Very strong, negative

Source: own research

All pairs of variables except “age-email” show a strong or very strong correlation. This fact confirms that people in the ages over 58 are very fond of the traditional travel agents use while young generations go for OTA.

The reasons why respondents choose particular OTA is based onto 4 statements of the respondents: “I can check reviews of previous guests” – 61 answers, “I get the best price” – 46 answers, “It is reliable and secure” – 45 answers and “I can compare several hotels in the destination where I am looking for accommodation” – 40 answers.

Predicated is the opinion that the hospitality business in Bulgaria is in the state of its development, where an approximate parity of the reservations made through online channels and those done by traditional offline means is observed. Online travel agents



are the main driving force on the digital market, and in the specific case of Bulgaria, the market leader has been found to have a significant share of the preferences of the travellers.

## **DISCUSSION**

The impact of the digital transformation process on the tourism industry will depend not only on how fast and how successful the technology is evolving but also on its cost and acceptability by consumers. One particularly important question arises, "Does access to a wide variety of digital knowledge-generating information deter the consumers from travelling or encourages them to travel?" The answer to this question will be one of the key determinants of future industry development. In general, the benefits to consumers are the large selection of different channels, customization of products, ability to compare products and prices, effective interaction with the e-mediaries - all of these aimed to increase purchasing opportunities. In hospitality sector companies like Booking Holdings, TripAdvisor, Expedia, Ctrip, Sabre Corporation, Airbnb and others have established themselves as the dominant global e-travel agencies (Marketwatch, 2019). They enable consumers to communicate with one another by supporting the exchange of information and advice about travel product, as well as allowing dissatisfied people to present their point of view. Consumers are more likely to trust information generated by other users than by product providers.

On the negative side of digitalization is standing the lack of global standards for quality, security and reliability of the provided information online. This leads to high costs for tourism organizations and to the induction of risk as a result of increased consumption of information, which in turn creates new information - not always accurate or even false and misleading due to its vast volume. A controversial effect is obtained to reduce the effective search for information. From the consumer's point of view, the rise in the number of alternatives increases the uncertainty and risks and as a consequence leads to higher costs both for the purchase and sale of the tourist product. And since sales are the beginning, not the end, of the buyer-seller relationship (Levitt, 1983), tourists are increasingly playing a role in creating and sharing travel information on the internet – information that they firmly trust.

The survey of consumer attitudes in Bulgaria is supporting the trend of digitalization and intermediation. According to Schegg (2018), the share of direct bookings has decreased across Europe from 57.6% in 2013 to 52% in 2017 and preferences of Bulgarian travellers drive these digits even down to 47% in 2020. Despite the clear outlining of the digital trends and the mighty ascent of OTAs, this research has some limitations considering sample size and the need for a deeper and more precise investigation. Presuming that older people in Bulgaria are not very active travellers it can be assumed that offline reservations are on the verge of losing their prevalence over online in the country. Habits and attitudes of travellers, especially in a small EU country, are not necessarily determining global trends in the hospitality industry and its digitalization process.

## CONCLUSION

Digital transformation in tourism is actually inevitable. It follows the global tendency of an increasingly connected world, and technology being an essential part of everyday life. Technologies online are transforming tourism organizations and their strategic, and operational management practices converting them into new consumer-oriented tourist organizations. Thus, the competitiveness of tourism enterprises will increasingly depend on their ability to use ICT strategically and tactically to improve their positioning in the mind of the consumer. The Internet and ICT are making a real difference in the tourism market from product-oriented to consumer-oriented. Based on the obtained data, the analysis of the sources on the topic and the interpretation of the results, the study outlines the specifics of the domestic travel market in Bulgaria in terms of tourists' behaviour regarding the accommodation and digital opportunities for hotels. The research framework allows the upgrading and comparability of further research activities based on established results and definitely completes the knowledge of the processes in the sphere of tourism in Bulgaria, despite some existing data limitations.

The peculiarities of the booking habits of travellers in Bulgaria are revealed as a basis for the tendencies of collecting tourist information and knowledge imposed by the younger generations. Digital transformation in tourism motivates a rethinking of the way people perceive travel, and that's the essence of smart tourism. The information generated and provided will be increasingly valuable and will stimulate adaptation of tourism resources to micro and macro levels, and to the individual consumer, to ensure that the benefits of it are fairly shared among all parties involved.

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