

Pohuda Nataliia

Candidate of Economic Sciences, Associate Professor,
Associate Professor of the Department of Tourism, Doctoral Student,
Simon Kuznets Kharkiv National University of Economics

Погуда Н.В.

Харківський національний економічний університет
імені Семена Кузнеця

THE INFLUENCE OF OTA CHANNELS ON THE TOURISM INDUSTRY

The article devotes the analysis of the most popular OTA channels in the world and their impact on the tourism industry. The differences between metasearch platforms (e.g., Trivago, Kayak, Google Travel) and OTA channels are discussed. Using the example of the European and Asia-Pacific regions, the impact of OTA channels on the generation of additional income and employment is considered. It was established that the use of these channels also led to a decrease in accommodation rates in the respective regions. It has been found that the use of OTA channels by independent and chain hotels is somewhat different in different countries. Among the large number of OTA channels in the world (more than 400 in the world), the most popular are Booking.com, Airbnb, Expedia, Agoda and Hotels.com. A comparison of the key indicators of visits to the sites of the leading OTA channels was made according to the data of 2021 and 2023. It was established that the most common models of commission remuneration are network and retail, and a comparison of the commissions for leading OTA channels was also made.

Key words: online travel agency (OTA), hotel, metasearch platforms, booking, commission.

Formulation of the problem. Among the large number of tourism enterprises, the competition between them only increases every year. In order to distinguish one's own enterprise from others, various channels of service promotion are used, where online travel agencies (hereinafter OTA channels) play an important role. After all, in order for potential tourists to learn about a small authentic hotel in a small town, it is not enough to have a website or use social networks for promotion, which are limited to a certain target audience. Therefore, the exit from the local level to the global level can be ensured thanks to cooperation with OTA channels. In addition to wide coverage of the target audience, these channels help increase competition, improve service quality, and reduce prices.

In modern conditions, the share of online bookings tends to increase, with both independent hotels and chain hotels leaning towards the services of OTA channels. The share of online bookings in tourism was 57% in 2019, which will increase to 68% in 2022 [1]. The biggest giants of the tourism industry, such as Booking Holdings and Expedia Group, occupy more than 60% of the online booking market in America and Europe [2]. It is difficult for small and medium-sized enterprises to compete for consumers with large ones, having much smaller budgets for promotion. Therefore, for enterprises of this size, the use of OTA channels allows you to create a unique value proposition. These channels contribute to the digitalization of the travel industry by connecting the B2B and B2C sector with all suppliers whose services are in demand.

Analysis of recent research and publications.

Among modern scientists, the study of modern channels of promotion of tourist services is reflected in many works. Thus, innovative marketing technologies in tourism are disclosed in the works of Sushchenko O. and others [3], Ivanova L. and Vovchanska O. [4], Bodnaruk O. [5]. The impact of digital changes on tourism is revealed in the works of Kalinichenko S. and others [6], where the authors paid considerable attention in the study to the types of digital technologies in tourism and the effect of their application. In the paper [7], Pohuda N. analyzed the main OTA channels and their specialization by sphere of activity, and in the work of Grabar M. and Pychkar Ya. [8], a study was carried out on the history of the formation of one of the leading OTA channels – Expedia Group through acquisition and mergers with various market players to achieve synergistic effects. Analysis of another leading OTA channel – Booking.com was reflected in the work of Grabar M. and Kashka M. [9], where the researchers considered the key indicators of the company's activity, the main takeovers and determined the marketing effect of the marketplace. At the same time, the influence of OTA channels on the tourism industry has not been sufficiently reflected in the scientific literature, as well as the definition of the popularity of OTA channels in the world.

Formulation of the purpose of the article.

The purpose of the work is to analyze the most popular OTA channels in the world and study their impact on the tourism industry.

Presentation of the main research material. In the era of digital transformation, more and more tourists prefer such channels that simplify the search and selection process, as well as allow booking all the necessary services in one place. Therefore, both OTA channels and metasearch systems, which have a wide arsenal of different services with the possibility of comparing all offers, are in demand. That is, the dynamism of the changes caused by the pandemic only contributed to the growth of demand for effective channels for the promotion of services, where in 2022 the annual volume of online bookings reached 798 billion dollars [2].

The key difference between OTA channels and metasearch platforms is that through OTA you can select and book the relevant travel service, while through metasearch platform you can only search, although this function is also added over time. These systems allow you to compare all offers in one place, where the most famous metasearch travel platforms are Trivago (hotels), Kayak (air tickets, accommodation, car rental), Skyscanner (air tickets, hotels and car rentals), Google Travel (air tickets, hotels, leisure, tourist places and attractions), Momondo (air tickets, accommodation, car rental), Hotels Combined (hotels).

The combination of modern information and communication technologies with tourism in modern conditions is interpreted as e-tourism [10; 11], which combines the interaction of travel service providers (tour operators and travel agencies, hotels, restaurants, airlines) through the use of information and communication technologies with consumers, and such interaction can be both direct and indirect.

An important role in such interaction is played by OTA channels (Online Travel Agencies), where they can also be found under the name Internet Distribution Systems (IDS) or Alternative Distribution Systems (ADS), which fully meet modern conditions and user requirements, such as contactless, speed, safety, convenience and multi-currency (as one of the promising directions in this area). Companies that previously operated either separately, or profiled in certain segments or services, began to merge, or were absorbed by stronger business representatives. And all this should be available 24/7 and with various service functionalities. The modern tourist market shows tendencies towards the active implementation of innovative

offers by any participant, whether it is a tourist enterprise [12; 13] or the consumer himself [14].

According to research by Oxford Economics [15], OTA channels have significant advantages for both consumers and the tourism sector and the economy as a whole (Table 1).

The key advantage of OTA channels is that the transparency and openness of the market increases, which ensures not only consumer access to search and booking, but also increases trust in service providers. The result of the work is the generation of more bookings and additional spending on other tourist services in the relevant destinations of the visit, and as a result, an increase in the impact on the economy.

Thus, in 2019, 33.7 billion euros were added to the European economy, with the beginning of the pandemic in 2020, although the volumes decreased, but still, there was an additional 12.9 billion euros, in 2021 – 11.8 billion euros [16]. For comparison, in the Asia-Pacific region in 2019, 15.5 billion dollars were additionally received from the activities of OTA channels, in 2020 and 2021 there was also a reduction under the influence of COVID-19, where 4 billion dollars were generated. and 4.3 billion dollars. respectively [15].

It is worth noting that OTAs also have an impact on the competitive policy of service providers, which affects the reduction of accommodation tariffs. In the Asia-Pacific region, in 2019, OTAs led to a decrease in the average daily cost of accommodation by \$7, in 2020 – by \$3 and a reduction of \$2 in 2021. For comparison with European countries, the decrease was more noticeable, where in 2019, on average, tariffs decreased by OTA by 10 euros, in 2020 by 7 euros, and in 2021 by 9 euros. Moreover, for example, if we consider hotel chains and independent hotels that use OTA channels, a greater reduction in tariffs was characteristic for independent hotels – by 12 euros for Europe, than for chain hotels – by 5 euros.

Among the 17 European countries included in the sample for assessing the impact of OTAs on the economy [16] and among 8 countries of the Asia-Pacific region [15], independent hotels used the most OTAs in Vietnam, and among chain hotels – in Australia (Table 2).

In addition, OTAs also affect employment, where thanks to their activities in the European region in 2019, an additional 566,000 jobs were created, in 2021 – 243 thousand,

Table 1

Advantages of OTA channels

Key features	For consumers	For the field of tourism
openness	stronger travel decisions; better travel experience; new tourist destinations; quality improvement; price/quality ratio	increase in sales; increase in workload; new tourists; repeat visit; increase in income and payment of tax revenues; the possibility of reaching the regional or international level
trust		
objective comparison		
search		
reservation	independent reviews	
Market effect	price reduction	increased travel

Source: [16]

in the Asia-Pacific region an additional 975 thousand jobs were provided, 2021 – only 169 thousand. OTA channels play a particularly important role in the activities of small and medium-sized accommodation establishments, where, for example, in Europe, the number of enterprises is estimated at 2.3 million establishments, most of which are of these types [17].

At the same time, the share of independent small and medium-sized hotels is 63% of room capacity, respectively, the issue of service promotion and competition with network establishments is especially relevant. According to research by EY Parthenon, OTA channels provide 40% of bookings in the European market for small and medium-sized enterprises (Figure 1).

Modern OTA channels offer differentiated services, which include hotel and restaurant reservations, airline tickets, excursions, various activities and entertainment, car rental and transfer services. After the COVID-19 pandemic, the share of bookings through them had a positive tendency to increase (almost 30%).

Among their large number (there are more than 400 OTA channels in the world), Booking.com has the largest share in the field of tourism as the most popular OTA channel, which is actively used by both travel companies and consumers. The income of this online agency grew dynamically until the beginning of the pandemic in 2019, as the number of users and bookings increased (Figure 2).

The increase in the presence of travel business representatives on the Internet has been observed especially in recent years, where the COVID-19 pandemic has only strengthened this position. In addition to the mentioned Booking.com, Expedia (more than 35% growth compared to 2021 [19]), Airbnb, Trip.com [7; 20] are also globally popular and with the highest revenues in 2022.

The market of online travel services in global measurement in 2022 was estimated at 470 billion dollars with further projected growth in 2023 [21]. The most famous among OTA channels are those that, first of all, offer accommodation services, as well as additional offers, such as airline tickets, travel packages, and others, so we will consider visiting the sites of the most popular among them:

- Booking.com (over 28 million registered objects [22], of which almost 980 thousand hotels, 1,174 million apartments, 19.6 thousand resort objects, 622.7 thousand villas, 44.3 thousand chalets [23]), with a traffic of 582.5 million visits as of May 2023 and 41 positions in the global ranking according to Similarweb [24]. Most requests in this period came from the USA (10.73%), Great Britain (7.85%) and Germany (7.73% of the total number of requests);

- Airbnb.com (traffic 104.5 million visits in May 2023) with position 163 in the global ranking according to Similarweb. TOP-5 requests: USA (74.31%), Philippines (1.38%), Germany (1.05%), Malaysia (1.04%), Thailand (0.96%);

Table 2

Characteristics of the OTA market in 2021, %

Direction	The whole market		Share of those who use OTA	
	Chain hotels	Independent hotels	Chain hotels	Independent hotels
Austria	28	72	24	76
Bulgaria	26	74	13	87
United Kingdom	66	34	45	55
Denmark	38	62	35	65
Greece	20	80	17	83
Estonia	24	76	18	82
Italy	22	78	13	87
Spain	43	57	28	72
Malta	44	56	32	68
Netherlands	52	48	31	69
Germany	44	56	32	68
Portugal	32	68	27	73
France	59	41	42	58
Croatia	41	59	23	77
Czech Republic	26	74	18	82
Sweden	62	38	45	55
Switzerland	19	81	23	77
Australia	47	53	77	23
Vietnam	44	56	11	89
India	62	38	45	55
New Zealand	46	54	31	69
South Korea	56	44	27	73
Singapore	52	48	48	52
Thailand	42	58	18	82
Japan	38	32	54	46

Source: [15; 16]

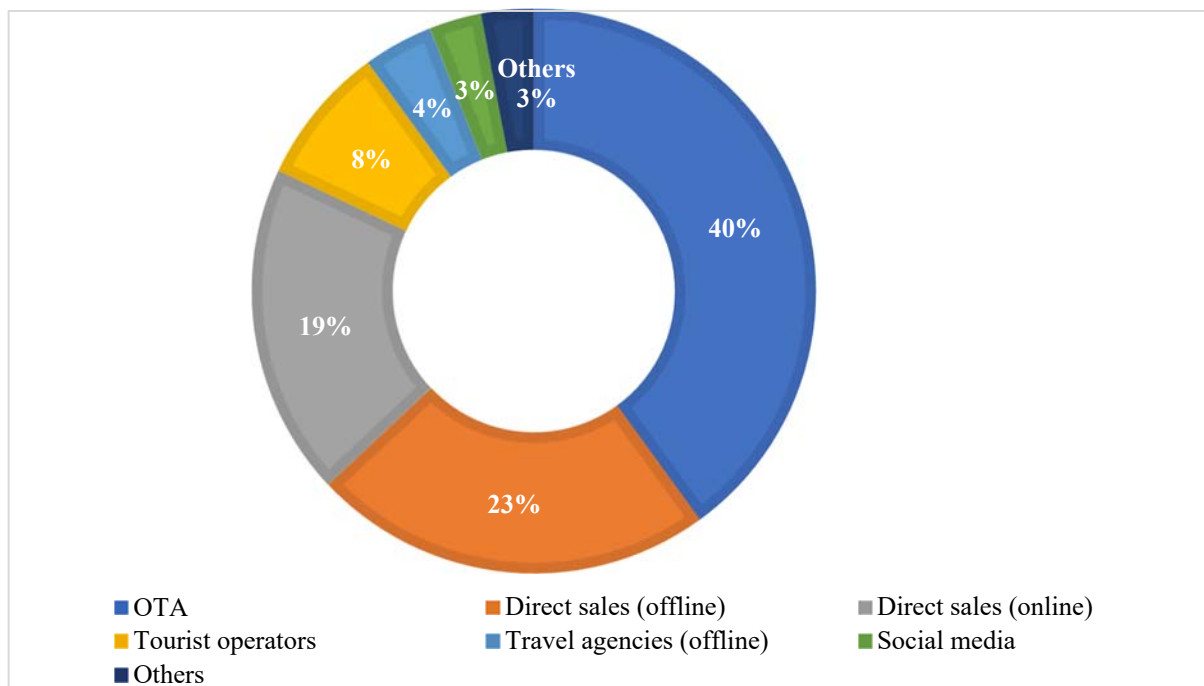


Figure 1. Weighted share of bookings through sales channels among small and medium-sized hotels in Europe in 2019, %

Source: based on [17]

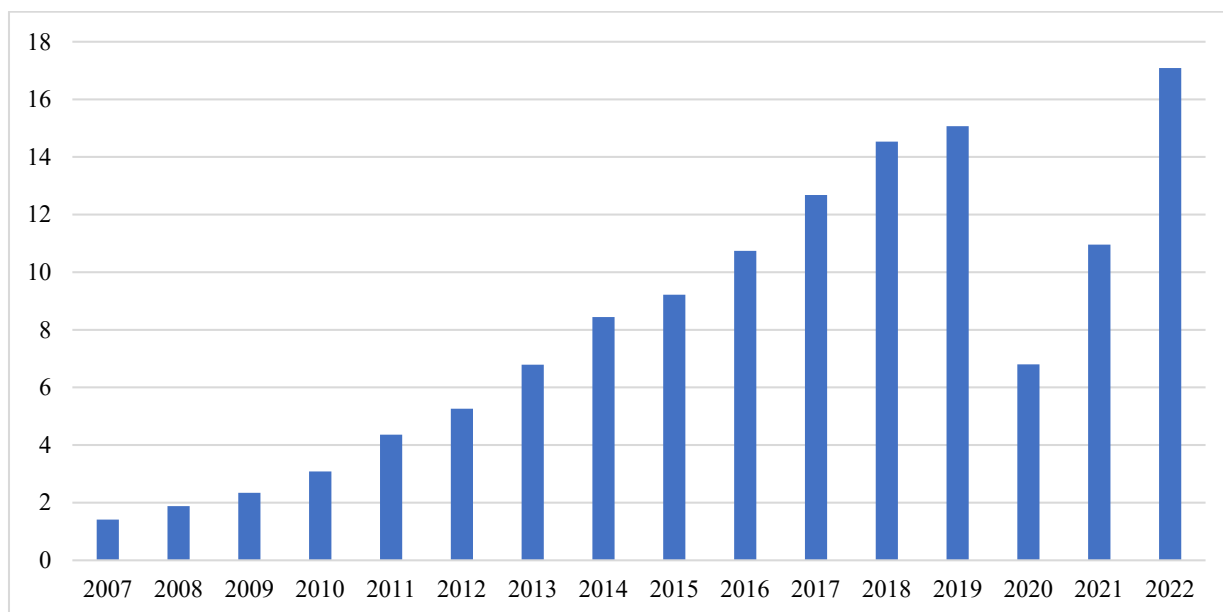


Figure 2. Revenue dynamics of Booking Holdings, billion dollars

Source: based on [18]

– Expedia.com (traffic 99.5 million visits) with 296 position in the global ranking according to Similarweb. Top requests in May 2023 came from the US (90.71%), Canada (0.82%), Mexico (0.49%), the UK (0.41%), and Australia (0.37%);

– Agoda.com (traffic 84.2 million visits) with 427 position in the global ranking according to Similarweb. Comparing the traffic with the data of 2021 (28 million

in July 2021), there was the largest increase among the considered offers, where the increase was 3 times. The most requests come from India (10.65%), Thailand (9.49%), Taiwan (8.16%), Malaysia (7.75%) and the USA (7.42%), where the geography of requests has also changed significantly in almost 2 years.

– Hotels.com (traffic 67.6 million visits) with 554 positions. It is most popular among residents of the

USA (47.26%), Great Britain (8.26%), France (4.65%), South Korea (4.24%) and Canada (4.01%);

– Vrbo.com (traffic 49.9 million visits) ranked 617 globally according to Similarweb. The main requests in May 2023 came from the USA (79.54%), Canada (4.97%), Great Britain (4.65%), Italy (1.98%) and Spain (1.65%);

The TOP of the most popular OTA channels in the world indicate the regional choice of consumers, however, residents of the United States lead in the number of requests for popular channels. This is also explained by the choice of accommodation facilities of OTA channels, which create a corresponding demand on the part of potential consumers of hotel services.

During 2021–2023, there were certain changes in requests for visits and bookings through TOP-5 OTA channels according to Similarweb data (Table 2).

As can be seen from the given data, the number of visitors to these OTA channels increased during the specified period. The greatest growth was characteristic of Agoda, where, in addition to the number of visitors, the

time spent on the site and the number of viewed pages increased. Regarding the number of bounces, that is, when a user leaves the site after viewing the first page, there was an increase in 4 channels, and only Expedia saw this number decrease by almost 5%.

Regarding the popularity of OTA channels in Ukraine, after Booking, Hotels 24 (with traffic of more than 235.8 thousand visits according to May 2023) and Doba (186.6 thousand) are the most popular [24].

The popularity of OTA channels is also evidenced by the statistics of program downloads, with Booking.com taking the lead (Figure 3).

It is worth noting that the level of retention of applications in the field of travel and tourism is quite high, namely 46%. That is, applications of OTA channels, after downloads in the 90s, are actively used after their installation [26].

In the work of the OTA of the channels, two models are distinguished regarding the commission fee. OTAs such as Hotels.com, Orbitz and Travelocity adhere to the network (merchandising) model, according to which the

Table 2

Comparison of key attendance indicators of the TOP-5 OTA channels

OTA channel	Total number of visits, million people		Average duration on the site, min		Number of pages per visit		Number of refusals, %		Traffic from social networks, %	
	July 2021	May 2023	July 2021	May 2023	July 2021	May 2023	July 2021	May 2023	July 2021	May 2023
Booking.com	517.9	582.5	8.56	8.39	8.87	8.71	30.74	33.19	1.71	1.8
Airbnb	88.2	104.5	8.31	8.13	20.44	19.05	27.84	31.38	2.13	1.62
Expedia	73.0	99.5	5.46	5.55	5.79	6.9	37.43	35.63	0.68	0.85
Agoda	29.4	84.2	5.43	6.17	4.62	5.2	37.36	38.28	1.31	1.83
Hotels.com	52.2	57.6	5.41	5.17	6.65	6.9	36.64	39.39	0.60	0.84

Source: [24]

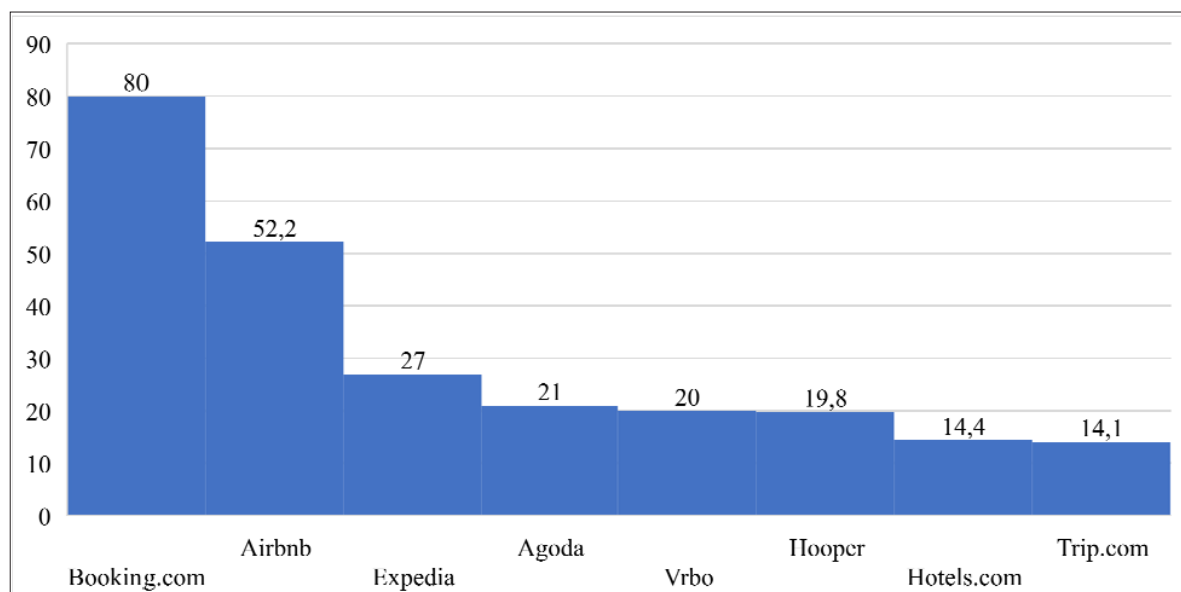


Figure 3. The most popular online applications of travel agencies in the world by the total number of downloads (2022), million downloads

Source: Built on [25]

site collects a fee, which is then passed on to the hotel, minus the commission. At the same time, the second model – retail (gross), used as an example by Booking.com, involves receiving a commission from the accommodation facility after receiving payment from the tourist in a certain period [27].

Regarding the size of the commission fee of OTA channels, according to Hotel Price Reporter [28], the size of the commission at the beginning of the development of these platforms fluctuated within 10%, but with the acquisition of popularity of their services, the size of the commission began to grow and currently varies from 15–30% , although for suppliers who want to appear at the top of the channel offers, the amount of the commission will increase. A comparison of the commission fee in different OTA channels is given in the Table 3, where the

size of which mainly depends on the country of location of the object, the size of the accommodation facility, the duration of the reservation and the cancellation policy.

If compare the percentage of cancellations for bookings on leading OTA channels such as Booking.com or Expedia, they have some of the highest cancellation rates in 2018 at approximately 49.8% and 26.1% respectively, while, as website cancellations were significantly lower at 18.2% [37]. This trend is also confirmed by the data in the Table 2 when comparing 2023 with 2021.

According to research by EY-Parthenon [17], during 2016–2019, the highest average annual growth rate of bookings of the number of nights in Europe in small and medium-sized establishments was among OTA channels (Figure 4).

Table 3

Commission remuneration of OTA channels

OTA	% commission	Feature
Booking.com	10–20	Payment is made at the expense of the guest, which is included in the accommodation rate. The commission is also paid for overbooking
Expedia	15–30	Independent hotels
	10–15	Big hotel brands
Airbnb	3+14.2	Split Fee: Charged to the host, but may increase for Italian representatives and owners with strict cancellation policies, and to the guest, consisting of the nightly rate, cleaning fee and extra guest fee (if applicable)
	14–16	Host-only fee: possible increase with strict cancellation restrictions or decrease if guest stays for more than a month
Agoda	15–20	It works according to two models: the model of the seller and the model of the agency (acting as an intermediary)
GetYourGuide (GYG)	20–30	Payment is made monthly, but payment twice a month is possible
Viator	20	When paying to a card, there is a minimum threshold of \$50, when using PayPal – there are no restrictions
Tripadvisor	8–16	

Source: [29–36]

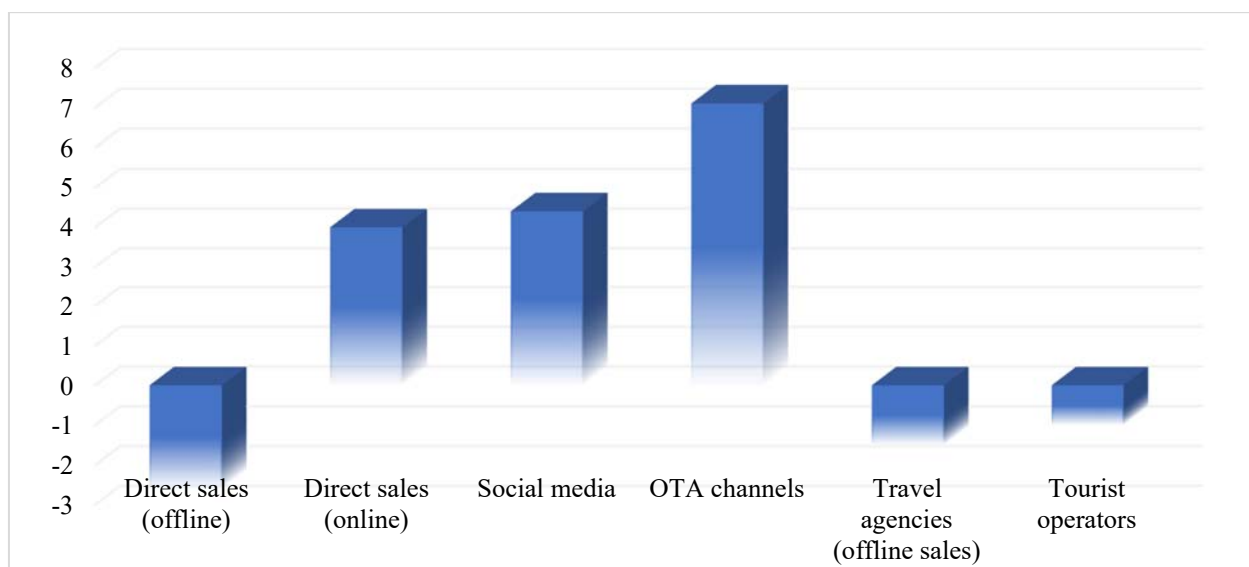


Figure 4. Average annual rates of increase in the number of nights in European accommodation facilities by various channels, 2016–2019

Source: based on [17]

That is, as can be seen from the data in Figure 4, sales through online channels were the most effective during 2016–2019. It is also worth paying attention to the direct sale of services, without intermediaries using the website, placing a booking module on it as part of the software, which allows you to simultaneously offer services using different channels.

Conclusions. Thus, modern promotion channels began to play an increasingly important role in the activities of tourism enterprises, among which OTA channels account for a large part. These channels have a significant number of advantages for both service providers and consumers

directly. The use of OTA channels helps to strengthen the competitive position of the enterprise, increasing sales and increasing customer loyalty.

The popularity of OTA channels is confirmed both by the number of their users, in particular by the number of downloads of the respective applications, and by the growth of the revenues of the respective channels. Using the services of OTA channels has a positive effect both for tourists and for the enterprises themselves, as well as for the economy. OTA channels have a positive impact on the generation of additional income, employment and contribute to the formation of a more competitive environment.

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ВПЛИВ ОТА-КАНАЛІВ НА ІНДУСТРІЮ ТУРИЗМУ

Дослідження присвячене аналізу найбільш популярних ОТА-каналів у світі та їх впливу на індустрію туризму. У роботі визначено найбільш значущі переваги від використання ОТА-каналів як для споживачів та постачальників туристичних послуг, так і для економіки країни. Визначено ключову відмінність між метапошуковими платформами (наприклад, Trivago, Kayak, Skyscanner, Google Travel, Momondo, Hotels Combined) та ОТА-каналами. На прикладі Європейського та Азіатсько-Тихоокеанського регіонів розглянуто вплив ОТА-каналів на генерацію додаткових доходів та зайнятість. Встановлено, що використання цих каналів призвело і до зниження тарифів на проживання у відповідних регіонах. Наведено співвідношення, на прикладі 17 європейських країн та 8 країн Азіатсько-Тихоокеанського регіону, між кількістю незалежних та мережевих закладів. Встановлено, що використання ОТА-каналів незалежними та мережевими готелями є децю відмінними у різних країнах. Зазначено, що ОТА-канали створюють конкурентну перевагу особливо для малих та середніх закладів розміщення Європи. У статті відмічено, що серед значної кількості ОТА-каналів у світі, найбільш популярними за кількістю відвідувань є Booking.com, Airbnb, Expedia, Agoda та Hotels.com. Здійснено порівняння ключових показників відвідуваності сайтів провідних ОТА-каналів за даними 2021 та 2023 рр., де після пандемії суттєві позитивні трансформації найбільше спостерігаються у Agoda. Також розглянуто популярність додатків у туризмі і з виокремленням лідерів. Встановлено, що найбільш поширеними моделями комісійної винагороди є мережева та роздрібна, якими користуються розглянуті ОТА-канали. У процесі дослідження встановлено, що із зростанням популярності ОТА-каналів відбулося певне збільшення і комісійної винагороди. Здійснено порівняння розмірів комісійної винагороди за провідними ОТА-каналами із зазначенням певних їх особливостей. На прикладі підприємств Європи визначено, що серед популярних каналів просування туристичних послуг найбільш ефективними є ОТА-канали, соціальні мережі та прямий продаж (онлайн).

Ключові слова: онлайн туристичне агентство (ОТА), готель, метапошукові платформи, бронювання, комісійна винагорода.