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Digital Marketing in the Hospitality Industry: What influence does Digital Platform Economy have on the booking rates of the Hotel Industry.

Thesis 2019

Abstract

The purpose of this thesis is to analyze the influence of the platform economy on the booking rates of hotels. This thesis concentrates on two platforms important for the hotel business, the Online Travel Agencies (OTA) and the Metasearch platforms. Booking.com is used as an example for the OTA and Trivago for the Metasearch platform.

The research is conducted with five different hotels located in Germany. The hotels differentiate in size, management style, classification and location. The online appearance on the mentioned platforms is analyzed for each hotel. Based on the findings a phone interview with the responsible employee of the hotel is held. The interview was typed down and analyzed according to the research questions. The questions concentrate on how the hotels use the opportunities provide by the platforms in order to increase their direct booking. On how many bookings are generated over third-party distributors and what the advantages and disadvantages of those platforms are.

The result shows that the OTAs are essential for the hotel industry as around 30% of the generated bookings are received over them. Metasearch platforms such as Trivago are not actively used as the risk of spending a lot of money without generating bookings is high. The main disadvantage of the OTA is the commission paid but it is a great channel to gaining awareness for hotels on such a highly competitive market.

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1 Introduction

This part of the thesis includes the background of the study the objective and the delimitations. After, the outline of the thesis is explained, including the theoretical and research part.

1.1 Background

Online and offline marketplaces play an essential part in the distribution of room nights in today's hotel industry. The different hotel guests, like leisure, domestic, international and business travelers are individually active in booking processes in the online world.

Choosing the hotel with the best offerings to the best price is done over different internet platforms. Travelers nowadays rarely visit physical travel agencies and trust the opinion of the employee on the best offerings. Instead travelers compare different online platforms and trust the rating on those websites. That shows the importance of a great and clever online marketing activity. Hotels must consider different options when being confronted with that change. These challenges and options are analyzed in the following study. (Kenney & Zysman 2016.)

Platform Economy or Digital Platform Economy is a very big and widespread terminology. It is the umbrella term for all economic and social activities practiced over the internet. Over the past years a lot of different types of platforms have been created and established. The most common platforms are the so called "digital matchmakers" like Amazon and Airbnb. Due to the rise of those platforms the digital marketing activities for companies had to and must change. (Lammenett 2018.) Platform Economy also plays a crucial role for the hotel business, as mentioned before the way travelers search and book their hotel rooms has changed. Digital platforms like Trivago, Booking.com, Momondo, TripAdvisor, Airbnb and many more, change the booking behavior of hotels. Being aware of the different platforms' hotels can take influence of their online appearance.

1.2 Objective of this Study

The objective of this thesis is to find out how the hospitality industry can use the services and opportunities provided by the platform economy. The question this thesis wants to answer is, how platforms are influencing booking rates of hotels. This thesis specifically concentrates on two platforms in order to be more concrete. The two platforms analyzed are the Online Travel Agencies (OTA) and the Metasearch websites.

The hotel business is a highly competitive market, and a hotel room is not stackable, which means it can only be sold once and only for that day or the future. That is the reason why it is important to know how to sell the rooms. (Walker 2017, p.144.)

This thesis concentrates on two different platforms which have a certain amount of influence on the booking rates of hotels. The first platform this thesis analyzes is the so-called metasearch platform. These websites compare prices and offers from different booking platforms and provide the searching person with a list of different offers. In that case the searcher can choose the best offer. (Sobotka 2016.) The aim of this thesis it to find out what kind of services these metasearch websites offer and how they can increase the direct booking.

The second platform this thesis analyzes are the Online Travel Agencies (OTA). These OTA offer travelers the immediate booking of the whole trip on the website, from flight, hotel to the rental car (Cloudbeds 2018). The aim of this thesis is to find out how hotels compete with the platform Booking.com in order to increase their direct booking. The research shows the influence the platform has on the booking rates of hotels.

This thesis gives answers to four main questions:

1. **What opportunities are used by hotels to increase their direct booking?**
2. **How many bookings are generated over the direct distribution channels of a hotel and how many bookings come from third-party distributors?**

3. **What are the advantages and disadvantages of the platforms from the viewpoint of hotels?**

1.3 Delimitation

Hospitality industry covers more than just the accommodation business, the food and beverage sector, for example is also part of the industry (Novak 2017). This thesis defines and explain the hospitality industry, but the main focus lies on the lodging industry.

This thesis does not analyze the customer behavior in detail. This thesis will talk about the shift to the online world and the influence on the booking rates of hotels but will not analyze the reason and behavior of the customers behind that shift.

For the research part, this thesis does not limit itself to a certain hotel category. The importance of digital marketing and especially the awareness of the two platform economies are relevant for every size and location of a hotel.

For the research the concentration lies on the German market; the interviewees are German hotel managers or marketing managers from different hotels. The reason behind that decision is the origin of the thesis writer. In order to analyze two platforms the study has to be limited to one country, due to the fact that the classification of hotels is different in every country. Another reason is that in different countries different platforms are more active. In Germany the chosen platforms are the most used.

1.4 Outline

This thesis starts by defining and categorizing the hospitality industry into their different sectors. As this thesis concentrates on the lodging sector the hotel business is defined in greater detail with the different guest types. Furthermore, the tourism for the year 2017 is analyzed to show the importance for the research. Moreover, the study explains the hotel business, with a short historical introduction explaining the two main used expansion strategies. Thereafter, this thesis concentrates on the classification of hotels in the German market, as the research concentrates on that market as well.

For further understanding of the influence of the platforms, direct and indirect booking and the importance for hotels are explained. As the focus of the study is around metasearch platforms and Online Travel Agencies, which operate as distribution channels, this thesis includes a chapter about distribution channels of hotels. Furthermore, the platform economy is defined and categorized. First, the historical development of the online travel is explained. Afterwards, the two platforms are explained, including the benefits for both customers and hotels. The thesis writer decided to explain the platform Booking.com as the Online Travel Agency and Trivago for the metasearch as an example of the platforms. The theoretical part is concluded with an outlook for the explained platform economy, in specific the platforms relevant for the distribution of hotel rooms.

The research of this thesis is conducted in two different steps. It starts with a desk research where the writer analyzes the online appearance of the chosen hotels. The author justifies the decision for the hotels. The second part of the research is an individual interview with the hotels to receive further detailed information answering the research questions. The thesis ends with a conclusion. The conclusion is a summary of the research in form of a result and ends with an outlook for the future.

2   The Hospitality Industry

The terminology 'hospitality' comes from the Latin word "hospes" (Wich 2018). The Cambridge Dictionary (n.d.) defines hospitality as an *act of being friendly and welcoming to guests and visitors*. Other sources say the term comes from the French 'hospice' meaning to *"provide care/shelter for travelers"* (Walker 2017, p.36). In the end they all mean the same to welcome travelers. Over thousands of years ago when the first foreigners traveled to different countries, hotels did not exist as known today. Travelers were dependent on locals offering private rooms or finding camping grounds. Not until the 18th century, when the transportation industry was further developed and it was easier to travel to foreign countries, rose the idea to establish hotels for travelers to stay in. (Wich 2018.) In the following Figure 1 it can be seen how the number of international travelers developed from 1950 until today. The graph also shows a prediction of the industry until the year 2030. As seen in Figure 1 the number of travelers has increased immensely over the last decades and keeps on increasing, which indicates that the tourism industry keeps on growing and with that the hospitality industry. One dot in the graph stands for 25 million visitors, which almost always doubled within one decade.
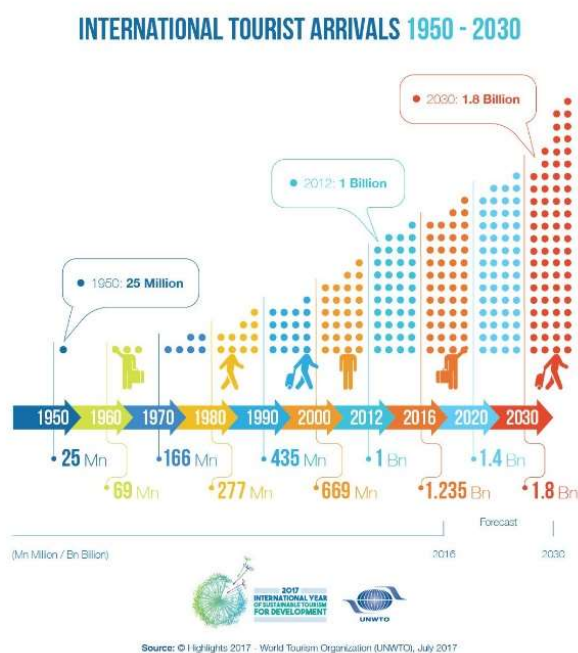

Figure 1: International Tourist Arrivals 1950 - 2030 (UNWTO 2017)

With these numbers displayed in the graph this thesis gains importance for further research. The United Nations World Tourism Organization (UNWTO) estimated that between 2010 and 2030 there will be an increase of round about 3.3% each year in the worldwide travel industry. The worldwide arrivals are supposed to reach 1.8 billion people by the year 2030 (Hudson & Hudson 2017, p.8).

2.1 Segmentation

The hospitality and tourism industry is a very broad field of operations; it can be said that every business which focuses on providing services for the leisure of customers, operates in that industry. The hospitality industry is a so-called umbrella term, which can be divided into five general categories. (Walker 2017, p.47.)

The **Travel Sector** is one of the biggest operation field, it includes the transportation of travelers via ship, plane, rail, car or any other transportation possibility. **Assembly and Event Management** is another sector which includes exhibitions or conventions for example. The so-called **Restaurants and Managed Services** also known as Food and Beverage sector provides guests with restaurant services. (Walker 2017, p.47.) Furthermore, the **Recreation Sector** stands for any activity and attraction that can be done in the free time of the traveler.

There are different types of traveler. The **leisure traveler** is the one who is on vacation and spends money on different sectors, for example on the previously explained food and beverages sector, the recreation sector as well as on the lodging sector, which is explained in the following part. The other type of travelers are the so-called business travelers, who travel on business, which indicates that maybe the sector Assembly and Event Management plays a more important role during the trip. (Novak 2017.)

The **Lodging Industry** is the fifth segment, which includes all possibilities for an overnight stay (Novak 2017). Hotels, motels, hostels and resorts are the most common choices for travelers to spend their nights (Walker 2017, p. 47). As this

academic paper concentrates on the hotel business, this segment will be explained in greater detail. Within the lodging industry there are many different visitors. Different research show that most sources have four types of guests in common. For the hotel industry it is relevant to identify the groups in order to provide the expected service and treatment.

One type of travelers, and therefore hotel guests, are the Backpackers, they are normally young travelers, who are very price-oriented and would most likely stay in a hostel rather than a luxury five-star hotel. (Schauble 2015.) Over the last years the type **Flashpacker** gained awareness in the hotel business, they are different to the known Backpacker generation. The difference might be in age and style of accommodation. Due to the rise of Flashpackers the traditional hostels, with shared rooms and easy interior, are disappearing. Hotels are experiencing the change where hostels gain the characteristics of a hotel. For example, that could be single rooms with a private bathroom, which was rather unpopular in hostels. The new types of hostels are very low staffed to keep the costs low. (SiteMinder n.d. a.)

Another group of travelers are **families**, which have different demands than Backpackers and Flashpackers. This group is more focused on the rooms, whether the hotel offers family friendly rooms or an extra bed for the kids. They also are not as price sensitive at the Backpackers. Families also like to have information about the activities that can be done close to the hotels. (Schauble 2015).

The third category defined by Schauble (2015) are the **senior travelers**. They have different needs and their focus lies on the interior, whether it is suitable for their physical abilities. Senior customers see great importance on personal communication with the hotel staff.

The last and fourth type of guests are the **business travelers**. These customers are to great value for hotels located in the cities. Business travelers are not price oriented as the Backpackers, the focus is rather on the location and convenience of the hotel. (Schauble 2015.)
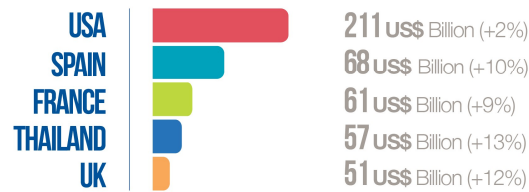
2.2 The Tourism Industry in 2017

As tourism is a very important factor for the hospitality industry, this part of the thesis provides figures and numbers that show the movement within the industry. The next two figures show the top five countries which spent and earned the most money in the tourism sector for the year 2017 according to the United Nations World Tourism Organization (UNWTO). Figure 2 shows the outbound expenses; China is the country with the highest travel expenses of around 258 billion US$ for the year 2017. The second country USA spent almost 50% less then China but still 135 billion US$. Germany is the third country which spent around 89 billion US$ in that year, followed by the UK and France.

Figure 2: World's Top Tourism Spenders 2017 (UNWTO 2018 b)

Figure 3 shows the inbound expenditures; the USA is the number one country people traveled to in 2017. It earned three times the amount that Spain did which is placed at the second most traveled country. Aaccording to the World Tourism Organization In 2017 the most popular countries for traveler were the USA, Spain, France, followed by Thailand and the UK. In 2016 the USA placed number one travel domicile followed first by France and then Spain. Thailand was in year 2016 not on the top five inbound countries, after France came the UK and the last was China (Hudson & Hudson 2017, p.8).

WORLD'S TOP TOURISM EARNERS 2017

USA		211 US$ Billion (+2%)
SPAIN		68 US$ Billion (+10%)
FRANCE		61 US$ Billion (+9%)
THAILAND		57 US$ Billion (+13%)
UK		51 US$ Billion (+12%)

Source: © UNWTO Tourism Highlights 2018 - World Tourism Organization (UNWTO), August 2018

Figure 3: World's Top Tourism Earners 2017 (UNWTO 2018 a)

3 Hotel Business

The hotel business belongs, as previously explained, to the lodging industry. It is a 155$ billion industry. Worldwide there are about five million rooms for guests and around 53,000 estates worldwide. The industry is constantly growing; there are two main strategies which made the rapid growth possible (Walker 2017, pp. 86-88) This chapter explains the two strategies used by hotels for their rapid expansion. Thereafter, this thesis focuses on the hotel's classification standards according to the German authority. Each country has its own standards. As the research is conducted in Germany this classification is explained. As this thesis focuses on different distribution channels the terms direct and indirect booking are explained. Furthermore, the different distribution channels are in focus.

3.1 Expanding Strategy

This chapter explains the two most used strategies in the past to establish the fast-growing industry. First, the franchise strategy is explained according to different examples followed by the management contract strategy.

3.1.1 Franchising

Franchise in the hotel business is the same as in any other industry. Franchising allows businesses to expand rather quickly with low costs. There is the franchisor which allows the franchisee to use the business concept. In the case of a hotel it can be the operating system, the booking system and standards, the different trademarks and many other concepts. The franchisee pays a fee to the franchisor for the allowance to use the concepts. Furthermore, the franchisee agrees to operate the business in accordance to the given guidelines by the franchisor. The franchising of hotels started in the USA with the Ritz-Charlton hotels in 1907. The worldwide known and represented hotel chain Holiday Inn also followed that internationalization strategy. Holiday Inn belongs now to the InterContinental Hotels Group. The development of the Holiday Inn chain started by offering mid-priced hotel rooms which were located closer to the city centers. During that time, the 1950's, the motels which were affordable, were located outside the city rather close to highways and airports. The hotels close to the city center were very expensive and therefore only affordable for a certain customer group. Soon after many mid-priced to low-priced hotels were established, the competition grew. The main strategy for hotels between the 1960's and 1980's was the franchise system, the Hilton which is still today one of the high-class hotel chains started by franchising. (Walker 2017, pp. 88-89.)

3.1.2 Management Contract

The second strategy used since 1970 by hotel owners is the so-called management contract strategy. It is a contract between a property owner and a management company. The management company operates the business within the hotel against a fee to the property owner. (Balyozan & Perret & Martin 2017.) This strategy was mostly used by investors with no knowledge in the hotel business, but interest in it. The Hyatt Hotels are an example for that operating model. The Hyatt Hotels is one of the biggest chains worldwide in the segment of luxury 5-Star Hotels. The owners founded a management and hotel ownership company which bought different hotels in different segments. (Hyatt n.d.) Now over 1000

hotels spread in America, Europe, Africa, South West Africa and in Asia Pacific belong to that chain. They own the hotels but have management contracts with different partners in order to not manage them all themselves. (Hyatt 2019.)

3.2 Classification

Since the research is conducted throughout different classified hotels, this part of the thesis explains the classification in the German market. Every nation has its own classification system. For example, in the USA and Canada there is a rating system according to AAA and Forbes (Walker 2017, p. 103). In Germany the organization DEHOGA (Deutsche Hotel- und Gaststättenverband) sets the classification requirements. Within Germany the requirements are mostly set higher than in other countries, which makes it hard to compare different standards in different countries. (Ahrnes 2018.) As the requirements are very detailed this following part will mention the main features.

1-Star Hotel

For hotels to belong in the category with one star, it must have a possibility for the guest to store their luggage. Furthermore, the hotel must have a reception with a fax or telephone available for the guests, a breakfast buffet and it must offer beverages. The rooms must be equipped with a shower or bathtub and a toilet, as well as a television with remote. It must also provide body lotion and bodywash. The hotels must have a housekeeping service which cleans the rooms daily. (Ahrens 2018.) The room size must be according to the minimum size which is 8 m² for a single room and 12 m^2 for a double room (Hotelier 2018 a).

2-Star Hotel

For the additional star, the hotel must fulfill additional requirement on top of the previous mentioned 1-Start requests. The hotel must offer a more enlarged breakfast buffet and the payment by credit card must be possible. Additionally, the offer for customers to buy certain supplies such as a toothbrush and tooth-

paste must be given. The rooms must have additional features, a light at the bed-side, towels, shampoo and a wardrobe. (Ahrens 2018.) The size of a room must be 12 m^2 for a single room and 16m^2 for a double room. (Hotelier 2018 a).

3-Star Hotel

A 3-Star Hotel must offer a lounge at the entrance with a 14-hour staffed reception and it must be available 24-hour. The rooms must be additionally equipped with a mirror, case rack, a minibar, a heating in the bathroom, a blow drier and cosmetic towels. The hotel must provide Wi-Fi and a dry-cleaning service. (Ahrens 2018.) The room size for a single room must be 14m^2 and 18m^2 for a double room (Hotelier 2018 a).

4-Star Hotel

A hotel belonging to this classification must have an À-la-carte restaurant, a hotel bar and a breakfast buffet with the possibility of room service. The reception must be occupied 18-hours. The rooms must provide a bathrobe, Wi-Fi, different cosmetic articles and a couch or an armchair with a side table. (Ahrens 2018.) The rooms must show a size of 16m^2 for a single room and 22m^2 for the double room (Hotelier 2018 a).

5-Star Hotel

The 5-Star class is the highest category for a hotel which can only be topped with the 5-Star Superior Hotel. The reception must be staffed 24-hours a day, the hotel must have a concierge and a so-called doorman. It must provide the rooms with a PC and Wi-Fi. Special service such as personalized greeting in the hotel room is required. Room service must be available 24 hours. Each room has a safe which can be used. In order to make sure of the special treatment there are so-called mystery checks, by which testers claim to be guests and analyze the hotel performance. (Ahrens 2018.) The single room must have a size of 18m^2, and the double room measures a size of 26m^2. (Hotelier 2018 a).

3.3 Direct and Indirect Booking

This chapter shortly explains the difference of direct and indirect booking as this thesis concentrates on third-party distributers and the terminologies will often be used in the following parts of the thesis.

When speaking of direct booking the hotel´s website as a distribution channel is often the first channel people think about. Hotels try to increase their direct booking as the transaction costs are rather low. (Kolter & Bowen & Makens & Baloglu 2017, p. 352-353) Hotels use many different advertisement strategies in order to increase the traffic on their own website. They integrate loyalty programs with which guests, that book over the hotels own booking system, receive a better room rate. Another option hotels use is to sell the rooms for a lower rate on their own website. There are many more options for hotels to increase their direct bookings. The main goal for hotels to increase the direct booking rate is due to the fees they pay for the third-party distributor. Direct booking means every booking which the hotel receives directly. A reservation via phone or E-Mail also belong to the terminology direct booking. (Feinstein 2016.)

Indirect bookings are therefore the reservations that come through the external distribution partners such as OTAs for example. Hotels pay commission for every reservation received through other booking systems. Due to the rise of the internet those bookings have increased. (Lenoir 2015.)

3.4 Distribution Channel

The importance of both online and offline distribution channels for the hotels has increased due to the rise of online bookings from travelers. A well-established distribution system can increase the success of a hotel. (Kolter et al 2017, p.349.) The use of more different channels can help to reach the different consumers, as already explained there are different types of travelers using different channel to book the rooms. The distribution channel can be divided into two categories. The first type is the direct distribution. It is considered as the easiest method, as there is no intermediary between the service provider and the consumer. The second

type is the indirect distribution, which includes a third-party assistance in between the provider and the consumer. (Hudson & Hudson 2017, p.186.) Before the right manager can be chosen the hotel has to decide on the right distribution channel. According to Hudson & Hudson (2017, p.205) there are three main tasks a hotel must consider. The first decision is the selection of the right distribution channel, meaning the hotel must consider carefully which provider they want to work with closely. The second task is the constant motivation of the channel to perform their very best and promote the hotel to their fullest satisfaction. There are many triggers in order to motivate the channel, one is the financial incentive, the more traffic on the website the more money the member earns. The last task of hotels is to monitor the distribution channels in order to always work together with the best providers and receive the biggest benefits. The hotel business is a highly competitive market which increased the need of online distribution channels. There are many different channels a hotel can decide to interact with. The five main distribution channels used by the hotels are shown in Figure 4. The circles in green show the channels for the direct booking, where the hotel has the lowest cost for the transaction. The purple circles are the third-party distribution channels for which the hotel has to pay a certain fee.
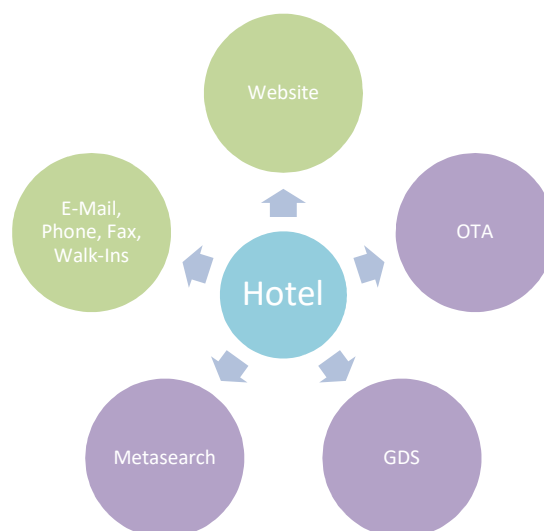

Figure 4: Distribution Channels

The hotels own website is the obvious channel a hotel can use to distribute their rooms through. A big advantage of this channel is the low transaction cost compared to the other external intermediacies. The only costs that arise are the cost

to keep the website and the booking system updated and to employ staff which a hotel need in any case. (Kolter et.al 2017, pp. 352-353.) As already explained direct booking can only be generated through the own website, via phone or E-Mail.

The rise of the bookings over the internet increase the importance of the Online Travel Agencies (OTAs) and the metasearch websites. They are also called third-party websites, which in some way receive a commission from the hotels in order to be listed or provide the ability of a booking system (Hayes & Ninemeier & Miller 2017, pp. 240-243.) As mentioned, metasearch is another channel hotel can and should use. Those platforms work differently than the OTAs but can be influenced by hotels marketing strategy. As this thesis concentrates on OTAs and metasearch platforms those two channels will be explained in greater detail in chapter 5.

Global Distribution Systems (GDS) were originally created in the 1950´s for the flight sector to advertise their sales (Thielin 2018). This system counts to the old-est distribution channel in the hotel business and one of the most established methods. Sources claim that the use of GDS is declining due to the rise of the online platforms. (Hayes et al. 2017, p. 235.) The three main Global Distribution Systems are Amadeus, Sabre and Galileo. Amadeus has a portfolio consisting of around 75,000 travel agencies, over 500 airlines and round 78,000 hotels. (Kolter et.al, p. 354.) The GDS distribution is one of the more costly channels, therefore it is mostly used to sell rooms in bigger quantity, for example to big companies (Thielin 2018).

All the different distribution channels can be managed with a program called channel manager. It connects all the different channels used by one hotel. For example, the room prices which change due to higher demand can be sent in real time to all distribution channels. The new room rates are available over every distribution channel by the hotel. There are many different providers for such managers, which indicates that hotels have to choose the best for their purpose. (SiteMinder n.d. c.)

4 Platform Economy

This chapter of the thesis defines the terminology platform economy. It looks at the historical development. Furthermore, it explains the different types of platforms according to two different sources. As the terminology is not well defined there is a lot of material explaining this change differently. For this thesis the writer chooses the two concepts which have a lot of overlapping theories.

4.1 Definition

During the research many different expressions appeared. Economists use the terminologies: Platform economy, digital platform economy or simply digital platforms, and many more, yet they explain mostly the same economical change in todays' society. There is no precise definition for digital platform or platform economy (Kenney & Zysman 2016).

Due to that fact, the thesis writer decided to divide the term platform economy and define them separately. According to the Oxford Dictionary (n.d. a) the term 'platform' is defined as *a raised level surface on which people or things can stand*. Whereas the term 'economy' is defined as *the state of a country or region in terms of the production and consumption of goods and services and the supply of money* (Oxford Dictionary n.d. b). A more modern source defines 'platform' as an online podium on which economic and social activities can be created and structured with the help of algorithm and cloud computing (Kenney & Zysman 2016).

Economists speak of the platform economy or digital platform economy as a new form of organization. Though the internet and the advanced technology the world and its inhabitants are connected on a different level, and with that, also the economy. Nowadays, almost every service shifted to the usage of online platforms and is indestructible. (KPMG N.V. 2018, p.4.) Thinking about the shopping behavior or booking of an accommodation, everything is done over different online platforms. There are many different types of platforms which will be explained in the next chapter. It can be said that due to the rapid appearance of those different

online marketplaces, the way in which a country and the society must work and communicate with each other has changed. Furthermore, the value creation within an economy faced a shift. Producers can profit from these platforms in form of a more flexible schedule. (Kenney & Zysman 2016.)

The KPMG N.V. (2018, pp.4-6) stated in their publication about the platform economy in 2018, that in order to have a better understanding it is necessary to acknowledge the shift in the industrial model. The first shift it faced was with the rise of automated machines which ensured the creation of mass production. The shift of marketing and advertising played a big part in that relation, which caused mass consumption. Lastly, the global delivery of goods via ships was possible and opened new markets for organizations. These three stages of development of the industrial factors, connected with the two big technological transformations the society faced over the last 20 years made the construction of the new economy complete. The first technological shift which led to the creation of digital platforms, has been the popularity of smartphones and its intensive usage. The shift though the digitalization in supply and demand opened new possibilities for online markets. The main key point of platforms was to provide different tools for everyone to build their own platform on an existing basis. The most common platforms are the operating systems IOS and Android. They provide a platform on which app constructers can sell their apps. Many other platforms in many different sectors work with the same characteristics to bring producers or service providers and consumers together in the online world. The main goal of platforms is to monetize activities done by humans. For example, Google turns the searches of users to money, social media platforms make money based on our communication. (Kenney & Zysman 2016.)

4.2 Types of Platforms

As mentioned before, there are different categories in which the different platforms operate. Different sources claim different categories, it is therefore hard to set strict characteristics in order to divide the platforms. In the following chapter two different approaches are explained. The difference is in the way the sources looked at the platforms. The approach of KPMG N.V. (2018, p.7) is to cluster the platforms according to the sector it operates in. The Authors Kenney & Zysman (2016) focus more on the way the platform operates and what technology it works with.

According to the first source the first sector platforms can operate in, are in the **sharing sector** (KPMG N.V. 2018, p.7). An example for that sector is the platform Airbnb, which provides a digital tool for offering and booking private accommodation. Airbnb was established in 2007 by two students wanting to earn money with their unoccupied room in San Francisco. That was the start of one of the most successful platforms in today's economy. (Gallagher 2017.)

Crowd platforms such as Wikipedia are another sector (KPMG N.V. 2018, p.7). Wikipedia is a platform that offers everyone the possibility to publish information on varies topics. Most articles are published and prove read by former authors. The Wiki's is one of the first online platforms besides blogs and web forums. There are many different Wiki websites, the name comes from the Hawaiian language, which means 'fast'. (Fenn 2015.)

Furthermore, there is the category for the **social media platforms** such as Facebook, Twitter or Instagram (KPMG N.V. 2018, p.7). Facebook is the most popular social media platform which is followed by the video platform YouTube. Instagram, Twitter and WhatsApp fall closely behind. Due to the great amount of different massaging services the success is different in varies countries. The usage of the social media platforms differs also among the generation, the younger communicate with services such as Snapchat, whereas WhatsApp is used by the broader population and even older generations use it as a communication system. (Ahmad 2019.)

The platform Uber is a so-called **on-demand platform** (KPMG N.V. 2018, p.7). Uber is a new way of transportation. People can offer their driving service, similar to a taxi but without any additional license. People looking for a ride can book the service on the website Uber. (Uber 2019.) Different sources declare that Uber as a platform belongs to the category sharing economy, as it shares the service itself (Kenney & Zysman 2016). Very common on-demand platform is for example Netflix, which offers the user to watch anything, anywhere at any time. (Netflix 2019).

Furthermore, the **gig platforms** provide different work-related help. It can be explained as a labor marketplace. A very common platform is TaskRabbit. (KPMG N.V. 2018, p.7.) TaskRabbit provides services such as helpers by moving to another place or if work must be done in the yard there will be professional gardeners to help (TaskRabbit 2019). A study conducted by Intuit showed that by the year 2020 almost 40% of the working society of America will offer their services as an independent contractor on an app. The intense usage of mobile devices supported the growth of the gig economy. Gig platforms mostly exist as an app which can be downloaded for free and users can find potential jobs or customers. (Stringfellow 2018.)

KPMG N.V. (2018, p.7) declares the booking platforms as part of the **marketplace sector**, a known booking platform is Booking.com which will be explained in more detail in chapter 5.

The classification by Kenney & Zysman (2016) is different than the previous approaches, it differentiates the platform according to the way they operate.

The first mentioned type of platforms are the ones which **serve as a podium for other platforms**. As already mentioned, the operating systems Android and IOS could be considered in that category, as they provide a platform on which an environment has been built on to. (Kenney & Zysman 2016.)

The second platform category is the one which **provides users with digital appliances** where new marketplaces and platforms can be created. (Kenney & Zysman 2016.) GitHub is one of the most known software development programs. Big players such as IBM, Airbnb, Spotify and many more use GitHub to build their software or manage their projects. The platform offers different digital tools to

support the built of a software. With a monthly fee, businesses can make use of them. (GitHub 2019.)

Platforms which **work as a mediate** are another type of platforms defined by Kenney & Zysman (2016). They operate as an information provider, for example LinkedIn sells information to the HR departments, which is freely given by individuals. Mostly the platforms operating in that category which are related to the labor market, like the previous explain gig economy. (Kenney & Zysman 2016.)

Platforms like Amazon and eBay belong to the so-called **retail platforms**. They are the most familiar online platforms. (Kenney & Zysman 2016.) Retail platforms are also known as e-commerce, which is the online selling and buying of goods. In 1995 these two biggest e-commerce businesses where launched and with that changed the way business offered their goods and for the society to buy. (Mourya & Gupta 2014, pp. 23-24.)

The last category is **service-providing platforms** such as Airbnb and Uber. Other platforms like Kickstarter or Indiegogo, which operate in the financial field, provide money in form of crowd funding. (Kenney & Zysman 2016)

Since there is no precise definition it is impossible to estimate a size of the platform economy. It can be said that there are four big fields in which businesses exist in form of platforms, the S*oftware & Service, the Ecommerce and Retail,*
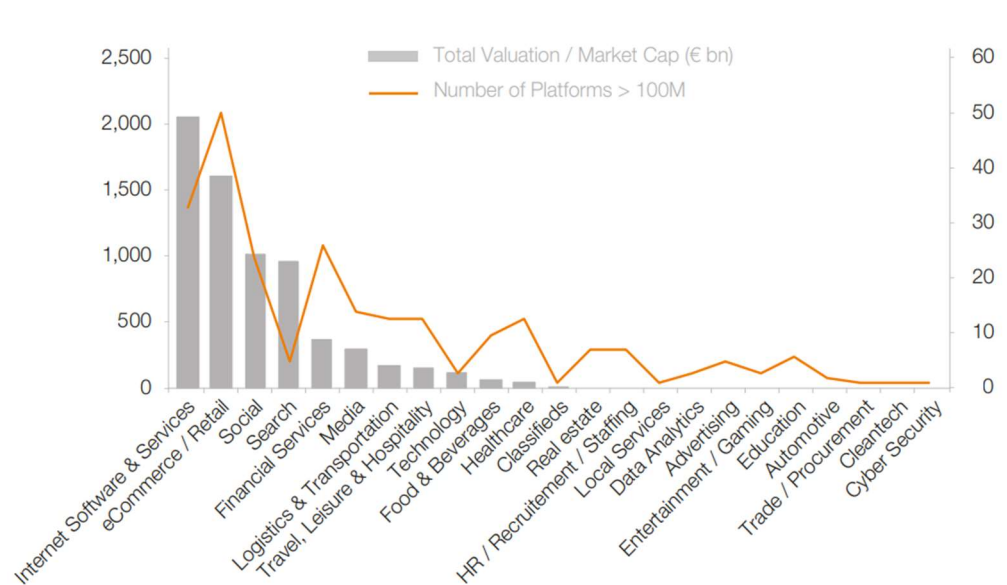

Figure 5: Global platforms by sector (KPMG N.V. 2018, p.11)

Social and Search, (KPMG N.V. 2018, p.9.) which can be seen in Figure 5. The Travel, Leisure & Hospitality industry is also very strong with around five billion euros total value.

5 Online Travel Business

This chapter explains the beginning of the online travel business, and how the development of the internet played a crucial role. Afterwards it explains the two platforms on which the research part focuses on, the metasearch platforms and the Online Travel Agencies (OTAs). It includes the impact that these platforms have on the hotel business. Lastly, this part ends with an example to each platform. For the metasearch platform the thesis writer chooses Trivago as a suitable example. Reasons for that decision are both personal and empirical which are later analyzed in more detail. Booking.com is the case platform for the Online Travel Agencies, due to similar reasons as for the metasearch platform.

5.1 Beginning of the Online Travel Business

It started in 1994 with the Travelweb.com which appeared as the first website that listed hotels all around the world. The possibility to book the rooms online followed shortly after. In the year 1995 the first plane ticket was booked over the web. It was a flight from San Francisco to Las Vegas. The platform was called Internet Travel Network (ITN) which was the start of the many providers nowadays. (May 2014.)

Microsoft, which was and still is a very outstanding technologically focused company, realized great potential in the online travel business. Microsoft created the platform Expedia. Expedia is known as one of the biggest and most successful platforms with multiple sub platforms in the travel industry. In the same year two students from the Stanford University created Google, the search engine. They found a way to list the pages according to the popularity and visits. After time

Google was the search engine everyone went to, and that was the start for travel providers to spend lots of money to show up at the top of the list. (May 2014.)

In 1998 the online travel agencies became stronger and more established in the United States. Meanwhile, two young Europeans created the website Last-minute.com. The e-commerce was still new territory, but the website offered last minute trips which could be booked online. (May 2014.)

In 1999 a site named FareChase was created and it had a different approach as other known platforms. FareChase was a search engine especially for travelers, the information was collected from other booking sites. Those are the so-called metasearch engines. In the year 2000 the platform TripAdvisor was born; it counts to one of the most popular websites for travel worldwide. TripAdvisor was also the beginning for hotels to rethink their booking process. In the year 2011 the tragedy 9/11 happened and with that a hard time for the online travel business started. Travelers feared the safety of booking flights online, but up to today air-lines use the internet for the booking process, the check-in process and to com-municate with their clients. (May 2014.)

Booking.com was created in 2004 along with Facebook which had an immense impact on the travel industry, as the social media platforms became a sharing point, where travelers showed where to do what. Most hotels, restaurant and other activity places are present on Facebook, and the possibility to make reser-vations is possible, as well as rating the services offered. (May 2014.)

The first smartphone from Apple in 2007 had great influence on the online travel business, because the website was available by using the smartphone. That also created the idea to offer applications related to the travel industry. The industry changing platform Airbnb, former AirBedandBreakfast, was established and of-fered travelers a different kind of experience. (May 2014.) As this thesis will not analyze the impact of Airbnb on the hotel industry, it will not be explained in greater detail. In 2011 the mobile app HotelTonight was created and it showed available room for the same day which could also be booked over the app (May 2014).

The advanced technology and platforms in the travel industry are changing constantly. Hotels have to consider many different marketing concepts to gain awareness and booking from travelers. Travelers change their decision-making process which will not be further analyzed in this thesis, but it can be said that with this shift the hotel industry has to change their marketing strategy. (Hudson & Hudson 2017, pp. 66-74.)

5.2 Platforms

For the travel business there are two major types of platforms which are explained in the following unit. The first and current most important platforms are the OTAs. This chapter explains the different providers for the different types of properties. Furthermore, the billboard effect is be explained which plays a role when talking about the influence OTAs have on the hotel business. Moreover, this chapter covers the second platform category metasearch.

5.2.1 Online Travel Agency

Online Travel Agencies are the online version of a traditional travel agency. A traditional travel agency gives travelers the possibility to book a trip over a third-party agent. A travel agent is an employee in the agency which provides the client with the necessary information. An agent can book the complete trip, starting with the train to the airport, the flight to the desired destination, the rental car at the destination that brings the client to the booked hotel. An agent can also pre-book tours, exhibitions and other activities at the travel destination. The travel agency receives a commission of around 10 – 15% from the different parties which play a role in the trip. (Hotels n.d. a.) Tasks that belong to the responsibilities of a travel agent are not only the booking of the trip but also the rebooking and rearranging because of changing circumstances (Morelock n.d.).

With the emerge of the internet and the embeddedness of the platforms in today's economy and society, the online booking of trips has increased. The term Online

Travel Agency became popular in 1998. It replaces the traditional agent with algorithms and an online platform. It allows clients to book their hotel, flight, rental car, table at a restaurant from home via the internet. The usage of apps increased the last minute and online booking. (Hotels n.d. b.) In the early days of OTAs, they had the purpose of selling leftover inventory when the demand of hotels was low. Now the number of indirect bookings over those OTAs has increased. OTAs provide the ability to compare every travel related decision. The OTAs earn their money by receiving commissions from the different service provider such as hotels. (Hotels n.d. b.)

The most known OTAs are Expedia, Booking.com and Hostelworld, which cover almost every type of traveler. The benefits of those websites are the possibilities to compare prices, receive feedbacks and see availability of every hotel listed on the OTA. The main feature of an OTA which makes them different from any other online distribution channel is the booking system they have. For hotels it is mostly free of charge to be listed at the OTAs. Hotels must create a profile providing information such as the available room types and the room rates. Hotels decide how many rooms belong to the OTA capacity and can be sold over their system. To be listed on OTAs is free of charge, nevertheless OTAs must earn money, which they do by charging a commission for every booked room over their platform. (Thielin 2018.)

For example Booking.com for example charges around 10 – 15% from the booking price, Expedia charges 18 -25%. Other OTAs also provide the opportunity to pay a higher commission and in return the hotel has a higher search ranking. Also, the commission varies according to the location of the property. Expedia has a country specific commission, but within the country the location is irrelevant. Booking.com in contrary charges the same commission worldwide. Knowing these differences is also important when choosing the right OTA. (Verot 2018b.) As OTAs invest a lot in online marketing they constantly increase their awareness and attract more travelers visiting their services (Thielin 2018).

5.2.1.1 Differentiation

Since there are so many different distribution channels, hotels struggle to find the right platform for them (Verot 2018a). Table 1 shows that there are different OTAs which are used by the different types of accommodation.

Type of property	Target Market	OTA
Hotels (Chains and independent)	Guests looking for a rather quiet more personalized escape.	- Expedia - Hotels.com - Booking.com - Ctrip
Bed and Breakfast (offering guests a unique experience and more personal)	Guests looking for a very personal and unique experience	- Flipkey - Airbnb - bedandbreakfast.com
Hostel (Low-price categories mostly used by backpackers, and travelers changing location often)	Backpackers, travelers with a small budget and groups traveling together	- Hostel World - HostelCulture - HostelBookers - Gomio
Vacation Rental (an entire house for rent)	Couples, family's group of travelers, which like to have their privacy and home feeling	- Airbnb - Flipkey - Booking.com

Table 1: Differentiation of Online Travel Agency

5.2.1.2 Billboard Effect

The Billboard effect is a marketing and advertising tool which is often used in the hotel business when dealing with online distribution channels. The big benefit is, that the Billboard effect increases the rate of direct bookings. (Verot 2018 c.) As previously explained direct booking means that the customers book the room through the hotels own booking system. The Billboard effect is the phenomenon that a potential guest books the room at the hotel's website after seeing it listed on Online Travel Agencies. The study by Chris Anderson and Saram Han from 2017 shows that from around 5000 hotel reservation, 54.5% were booked over OTAs and 45.5% were made on the hotel's website. 65% of the guests which booked directly on the homepage visited an OTA before the actual booking. The study underlines the importance for hotels to be present on different OTAs and other online platform in order to gain awareness and in best-case direct bookings. From 2011 to 2017 the effect decreased by around 10% caused by many different reasons, but still shows the importance of the Billboard effect. The authors see the slight decrease due to the fact that consumers are more advanced in dealing with the internet and have more trust that the algorithms work, when promising the best price. (Anderson & Han 2017, pp.3-11.) For hotels to use the Billboard effect and use the advantages it provides there are a few steps and strategies to consider.

The first step for a hotel is to be listed on multiple OTAs fitting the hotels type. The different types can be seen in Table 1. The focus should not be on only one external distribution channel, as there are so many different providers. (Verot 2018 c.)

The second strategy hotels should consider is to get listed on so-called authority portals such as Google Maps, TripAdvisor or metasearch platforms (Verot 2018 c). When travelers do not have a specific hotel in mind most of their search starts by Google. That is the reason why Google should be considered as a distribution channel. Google was rather late to start in that field, but in 2018 started to offer many different tools. Google offers the feature to book the hotel directly on

Google Maps. By managing the Google presence, the direct booking can be increased. Google offers different tools and services to optimize the content of the hotel's online appearance such as the possibility called 'Book at Google'. Google charges money for the different tools and services but mostly are more affordable than the commission charged by the OTAs. (Duetto n.d.) TripAdvisor is considered as one of the most used websites when searching for a hospitality service. Around 83% of the users claimed that they read the comments and ratings before the booking process. TripAdvisor does not charge hotels and other services of the hospitality industry to register their property. (Verot 2018 c.)

TripAdvisor offers travelers to comment their experience in the accommodation for example, whereas the accommodation owner can respond to the review. In most cases the respond creates a positive feeling toward the accommodation. The platform gives travelers and service providers the chance to communicate for everyone to see. It also must be considered that it is available for everyone and that impressions differ from consumer to consumer. That is the reason why hotels using the services provided by TripAdvisor must be very cautious when dealing with reviews and comments. (Breslow Sardone 2019.) Another platform that should be considered by hotels is the metasearch. Travelers usually use different search keywords which can be detected by the metasearch platforms and transfer the guest to the website with the best offer. When offering the best offer that would increase the direct booking and with that the Billboard effect. (Verot 2018c.)

The third step is related to the hotels own booking system. A hotel should make sure that the website is user friendly. With a bad website traveler are more likely to go to OTAs or worst-case lose interest in the hotel altogether. The booking process is an important factor as well. The Billboard effect implies the attraction from OTA visitors to the own website, but the actual success is after the visitor books the stay though the hotels own booking system. That is the reason why hotels should make sure that the potential guest has an easy and pleasant stay on the website. All stages of a visit must be smooth for the customer. That includes the pre-stay and post-stay communication as well as the actual booking process with payment and everything. (Verot 2018c.)

The fourth step hotels must consider are the special offers they provide guests by booking directly at their own website. There are different strategies hotels can use to reward direct bookers. Possibilities are the so-called Best-Rate Guarantee, which guarantees guests that the rates on their own website are the lowest. Another strategy is to reward guests with some extras which only direct bookers get. Typical extras are for example a free upgrade or special cancellation policies. (Verot 2018c.)

The Billboard effect can be influenced by many different elements and hotels must consider them in today's distribution ecosystem. The increase on direct booking makes it possible for hotels to save cost paid for the bookings over OTAs.

5.2.2 Metasearch Platforms

The importance of an efficient online marketing strategy has increased over the last years. In 2015 organic traffic on a hotel website was around 62% and dropped to 42% in year 2017. Organic traffic is the term used to describe travelers who visit a hotel's own website without the paid advertising on OTAs or metasearch engines. With the help of the correct marketing strategy and usage of metasearch hotels can improve their organic traffic. (Boss 2017.)

The metasearch platforms are younger than the OTAs and work differently. They list the current room rates of many different hotels in a certain destination. The big difference is that metasearch engines need the information provided on OTAs in order to work. Metasearch lists many different prices for the same room in the same hotel, since they take the prices and information listed on the different OTAs. Unlike the OTAs hotels do not have to list themselves on metasearch engines, as they are listed on the different OTA platforms, but hotels have the opportunity to take direct actions on the metasearch. (Thielin 2018.)

Very well-known metasearch engines are Trivago, TripAdvisor and Google-HotelAds. For hotels to have an influence on the metasearch engines is by using a channel manager that allows hotels to provide them with a direct link to the hotel's own website. As previously explained OTAs charge a commission for

every booking, metasearch engines use a Pay-per-click-Model (PPC). The PPC system means that the hotel only pays when their link is being used and the guest is transferred to their own homepage. (Thielin 2018.)

Metasearch engines normally list the different rates according to different OTAs and provide the guest a comparison. The traveler decides the suitable offer and the website transfers the guest to the platform with the offer. In most cases that is an OTA or the website of the hotel. Metasearch engines such as Google or TripAdvisor also offer instant booking, meaning the traveler can stay on the website and book the hotel there. That would indicate that they operate as OTAs and hotels pay a certain commission for the booking process. (SiteMinder n.d. b.)

Currently there are a lot of changes, as small metasearch platforms are bought by bigger ones or as just mentioned TripAdvisor is changing in the direction of an OTA by having an included booking system. (SiteMinder n.d. b.) To increase the direct booking the same strategies as explained in the chapter about the online travel agencies have to be used, meaning to reward the travelers who book on the own website. Although the metasearch lists the hotels according to offers listed on OTAs and other websites, it is not enough to rely only on the performance of those channels. The correct handling and advertisement of the metasearch engines have to be considered as well. (Thielin 2018.)

5.3 Example of an OTA and Metasearch platform

This chapter explains the two platforms OTAs and metasearch based on examples. The thesis writer chooses these examples due to self-made experience with them. The writer relies on those platforms when booking or researching travel destinations.

5.3.1 Online Travel Agency - Booking.com

Booking.com was founded in 1996 in Amsterdam, Netherlands and currently employs 17,000 people in 70 countries worldwide. Their mission is to *empower people to experience the world.* Around 1,550,000 booking are made over this platform every day. Booking.com has more than 28,000,000 properties in its portfolio in around 150,000 destinations. (Booking.com n.d. a.)

Booking.com provides a booking system over which customers can book their preferred accommodation which makes it to an online travel agency. This website does not charge the guest for the booking, and acts on behalf of the service provider. That is the reason why the commission for the booking is paid by the provider after the guest used the booked service. Booking.com only list properties which have a contract with them, which provide all information such as the cancellation policies, room rates in real time and additional services. (Booking.com n.d. a.)

Users have many different options to receive the listed properties as it can be seen in Figure 6. They can either choose the top picks by an automated algorithm from the website itself. This algorithm lists the property by different criteria. These can be the popularity of the property or the room rate. The visitor can also choose to filter the list by listing the properties according to the lowest price first. Furthermore, it can be ranked by customers reviews, meaning the best value for the price is listed on top. The third possibility to receive the properties is ranked according to the classification of the hotels. (Booking.com n.d. b.) As explained in chapter 3.2 there are certain criteria a hotel must fulfill in order to receive stars. Similar to the customers review, the guest can select the prioritizing of properties

according to the review guest gave. The last feature guest can select in to list the accommodation based on the distance to the city center. (Booking.com n.d. b.)

Figure 6: Ranking possibilities (Booking.com n.d. c)

In order for guests to search more precisely they can set more filters such a budget they are traveling with, the type of accommodation they are looking for, things they can experience at the destination, different services provided by the accommodation and many more (Booking.com n.d. c).

In the eyes of hotels using Booking.com as an OTA distributor comes first with commission a hotel has to pay for every booking done through the website. But on the other hand, booking.com has many additional features hotels can profit from. They partly take over the marketing and advertisement for the hotel. They advertise their platform in every search engine, as most travelers start their journey by looking on search engines such as Google. When registered by Booking.com the property is also listed at Google Maps. Many travelers comment their stay at the different hotels on the booking.com website, as booking.com also reminds the guest to leave a comment. When working with the website hotels have the possibility to reply to comments and show an interest for their guests to have a pleasant stay. As Booking.com is not only focused on accommodation, they are also working together with many different airlines. When sold a flight ticket they promote the accommodation at the destination. (Booking.com n.d. d.)

5.3.2 Metasearch Platform - Trivago

Trivago is a comparison website for hotels which was founded in Germany in 2005. The name comes from the French **Tri** which means 'to sort' **Va** translated is 'go' and then another **Go** which should stand for immediately. The meaning behind the name is '**to sort out the trip immediately**'. It collects data from over 400 different booking websites for more than 2,5 million hotels in over 190 different countries. Trivago is a classical comparison website which means it does not provide a booking system. After choosing the suitable hotel the guest will be transferred to the website with the best offer, on which the visitor then books the hotel. Trivago has over 175 million ratings on the different hotels which are available for the guest to make their decision. With different filters the visitor can customize the search, like the booking.com service. (Trivago n.d. a.)

One of the founders Mr. Schrömgrens mentioned during an interview with Handelsblatt, that they will not follow the other websites to enlarge their portfolio into sectors such as flights or rental cars. Schrömgrens emphasized that Trivago is focused on the improvement of the hotel search engine. All three founders want to stick with what they know best, the hotel industry. That was the differentiation from the other metasearch websites such as TripAdvisor. As already mentioned, a lot of the metasearch websites include their own booking system which changes them to be an OTA. Trivago is certain to not wanting to include their own booking system. The future perspective of the three founders is to personalize the search for each customer. The taste and preference of each is different and Trivago wants to make it possible for the customer to stay in the hotel which fits their personal circumstances. With the customized search result that would differentiate Trivago from the other competitors. (Terpitz 2017.)

Many travelers prefer the metasearch platforms, as they provide the price comparison. That means the first address for travelers change. They more often visit Trivago instead of Booking.com, which makes it more important for platforms such as Booking.com to work closely together with Trivago to receive the booking traffic. (Hamed 2014.) Trivago does not earn money for any booking, as already explained in the chapter about metasearch platforms, they get paid as soon as a

user activates a link from one of their partners. With that known the price completion between the Hotels own website and the OTAs is one of the key factors for the existence and success of Trivago, because the users are aware of the war and enhanced the traffic on Trivago for example. (Hamed 2014.)

As mentioned in the chapter about the metasearch platform they are free of charge for the hotels to establish a profile, but also most hotels are automatically listed due to the contract with the OTAs. The offer of Trivago is to be found on the website and for the owner to manage the profile. The more detail the hotel provides the users of Trivago the better will be the search results. Hotels can upload pictures and descriptions, the more a hotel lists the better will be the transparence for the guests. The more detailed the description is, for example the equipment of the rooms, the easier it will be for the guests to find the hotel. Trivago collects all the different comments from websites such as Expedia and Hotels.com for example. The guests can see the different comment and ratings from different OTAs on one website. Trivago offers the possibility for hotels to generate more direct bookings by providing the hotels own booking system and the possibility to set the best price. (Trivago n.d. b.)

Trivago offers the Hotel Manager PRO package which helps hotels increase their direct bookings by 45% according to the internal data from 2018. For hotels one of the biggest difficulties is to increase the direct booking. With the Hotel Manager PRO of trivago that is possible. There is a new possibility to advertise the special offer when booking on the hotel's website and increase the direct booking rates. Another special feature for hotel to the increase direct traffic by providing the contact details of the hotel directly at the profile. The details will be in a blue color, so the guest is made aware of the additional information. With the PRO package Trivago provides the hotel with a ranking of the top-10 nationality of the potential guests. The system provides the information about the reason of stay and the length. Furthermore, the hotel can compare itself with other hotels in the same category. (Trivago n.d. c.)

6 Future of the Platforms

Alexander Birk (2019), one of the German marketing experts in the field of digital marketing in the hotel business, sees the future of the online distribution channel as one of the most important business partners of hotels. Hotels have to face the shift into the online world of the customers. The OTAs can also be used as a trigger to get the guest to book the night in the hotel, after the stay it is essential the hotel to try to get the guest to book the next stay over the hotel's own booking platforms. The after sales is in the world of OTAs one of the most important steps.

One of the challenges for the future is the price parity of booking.com. That means that the hotel is not allowed to provide other platforms different room rates. For many hotels the only chance to offer better rates is when implementing a reward system. Most of the bigger hotel chains have included such a system where customers collect points when being member of that system. The hotel has the chance to offer better conditions. Birk indicates that OTAs can be seen as a door opener for the guest, but the hotel has to get the guest to become a member of either the reward system or wanting to book directly. (Birk 2019.)

Price parity is very difficult and unsatisfying for the metasearch platforms. As mentioned, the metasearch platform is a comparison website, when all listed provider offers the same room rates and the guest will not need a comparison website. That is noticeable as many metasearch platforms transformed into an OTA such as TripAdvisor. When looking at the stock market it can be seen that the stock prices for Trivago has decreased over the last few years whereas the prices for a share of Booking.com has increased immense. The future for metasearch platforms will be very hard as long as there is a price parity. (Birk 2019.)

Another barrier is that booking.com and other OTAs have their homepage in almost every language. A hotel normally has their homepage in their home countries language and English. For a hotel to translate the homepage into multiple foreign languages is extremely expensive and that has to be considered. The commission paid to booking is in most cases less expensive when offering every feature on the own website. The booking process is less intense when being listed on OTAs in most cases which means the hotel has to employ one employee

less. Each hotel, belonging to a chain or being independent, has a booking system. Most of the hotels use a already existing system and has to pay a fee as well. All these mentioned costs have to be counted against the commission paid to OTA's. In many cases it is only a few percentages higher then the costs in a hotel. (Birk 2019.)

The expert sees a great competitor to the existing OTAs the newcomer GoogleTravel and GoogleHotelSearch. The expert highly suggests all hotels to be listed and use the OTAs as it is a positive way to be noticed on such a highly competitive market. (Birk 2019.)

7   Research Method

The method chosen for this thesis is the qualitative research method. It is a type of the scientific research, which tries to find the answers to specific questions. This kind of research method also focuses on answering the question 'why'. The qualitative research method could also be explained as a more communicative method to analyze and collect data. The qualitative research method allows the researcher to a deeper understanding of the research problem. (Bhat n.d.) There are many different types of qualitative research methods, for every method it is essential to minimize bias opinion. Nevertheless, it is important to have a pre-understanding but should not affect the analysis of the research. The thesis writer decided to use the content analysis as the fitting research method. There are many different data collection methods to choose from. For the thesis is was decided to use the deep interview research. The advantage of an interview as a research method is the depth of the research, as the author can deepen the discussion with the interviewee. The chosen method is often used when summarizing the information, rather than detecting new findings. The researchers aim is to seek answers to the research questions by different research partners. There are two different forms of content analysis, the one chosen for this thesis is the *manifest analysis*, as the researcher stays very close to the statement of the interviewee. The other type would be the latent analysis in which the author has more freedom to interpret the underlining meaning of the spoken. (Bengtsson 2016.)

For this thesis the writer chooses to split the research in two main parts. It starts with a desk research. The author analyzes the chosen hotels with a short justification on why the hotel was chosen. The author decided to analyze different hotel with different backgrounds in order to have a better understanding of the influence the OTAs and metasearch platform have. The research continues with an individual interview with each hotel manager or marketing manager. The interviews are based on the findings of the desk research and are held via phone.

For the content analysis method it is important to inform the participants of the study and as permission for being included and analyzed. The next step is to send a preliminary questionnaire in order for the interviewees to prepare and grant permission to publish the research. Each informant has to be clear that the participation is voluntary and can be withdrawal. All information has to be treated confidentially. The recorded interviews should be transcribed in written form. In order for the content analysis to gain validity the research should send the written transcript and analyzed data to the informant to eliminate any misunderstandings during the interview. (Bengtsson 2016.)

The interviewee receives a preliminary questionnaire and asked for permission to record the interview. After the interview the writer types down the recordings in order to analyze the interview. Due to the confidentiality of the recording the thesis does not include the typed down interview. The interview is analyzed based on the research questions and the finding of the desk research. Therefore, each interview is treated individually. To strengthen the trustworthiness of the research it was decided to send the analyzed data to the informant.

8   Research Process

The research is divided into three parts. It begins with the introduction of the chosen hotel. Followed by the online appearance and completed by an interview with the responsible manager of the hotel.

The aim of this research is to analyze the online appearance on Booking.com and Trivago compared to the homepage of the hotel. The research should show if there is an increase of direct booking with the platform Trivago. The aim of this research is to find out how hotels work with Booking.com and how they compete with them in order to increase the direct booking.

The research gives answers to the following questions:

1. **What opportunities are used by hotels to increase their direct booking?**
2. **How many bookings are generated over the direct distribution channels of a hotel and how many bookings come from third-party distributors?**
3. **What are the advantages and disadvantages of the platforms from the viewpoint of hotels?**

The thesis writer decided to analyze five different hotels located in Germany. They differentiate in their size, classification and location. The research writer decided to analyze different hotels belonging to a bigger hotel chain. The chains are Best Western and Holiday Inn, two of the biggest chains worldwide. There are differences in their marketing structure and management type. The Best Western is a franchise concept where only the brand names are used, but the hotel is still privately owned. Therefore, the hotel owner enjoys more freedom and independence in leading the hotel. The second chain is the Holiday Inn, which is also managed by the franchise concept, but not privately owned as the Best Western. Holiday Inn has set policies which are followed by every hotel belonging to the chain. In the research are two high class hotels with a 5-star classification, three hotels with a 4-star classification which all belong to a bigger hotel chain, and one small privately owned hotel with a 3-star classification. This part of the thesis will introduce the hotels and analyze their online appearance on the OTA, booking.com and on the metasearch platform Trivago. The thesis writer will compare the overnight prices on the platforms and their own website for the night from the 26.06.2019 to the 27.06.2019. The date will be the same for every hotel to ensure a consistency throughout the research. After the desk research the interviewer will contact the hotels to discuss the findings.

8.1.1 Lamm Hebsack

The researcher decided to analyze a hotel in a more rural area which is privately owned and does not belong to a chain or big corporation. It is a 3-star hotel outside of Stuttgart in a rather small unknown town. In Germany there are 4,941 3-star hotels (Hotelier 2018 b). That is another reason why the author decided to analyze the online appearance of a hotel on a highly competitive market.

8.1.1.1 *Introducing the Hotel*

The hotel is a family-owned hotel in Hebsack, a small town close to Stuttgart, Germany. It is owed by the family Polinski and Hasert and has a 3 Star standard. It is equipped with 23 rooms, a restaurant with traditional Swabian food as well as a traditional wine cellar, as the region is surrounded by vineyards. As the hotel is rather small the owners pay a lot of attention to a friendly and family-like atmosphere. (Hotel Lamm Hebsack. n.d.) Their online appearance is outsourced to an internet agency named TourOnline AG.

8.1.1.2 *Their Online Appearance*

When analyzing the hotel on booking.com the rating is high with 8.8 points out of 10. The comments left on the platform are mostly very positive. The online activities of the hotel are outsourced to a marketing company. When comparing the prices from booking.com with them on the hotels own website a difference can be seen. Hotel Lamm Hebsack offers a cheaper price on their own website. (Booking.com 2019 a) Figure 7 shows the price of 120€ when booking on their website and when booking on any other platform the guest pays the standard rate of 130€.
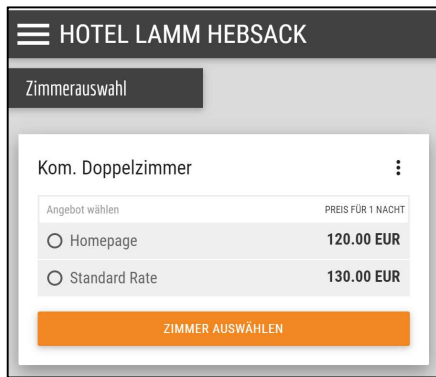
Figure 7: Zimmerauswahl (Hotel Lamm Hebsack 2019)

When analyzing the appearance on Trivago, in Figure 8, it can be seen that they are listed and have a good rating, but the hotels own website is not marked or shown on their profile. The guest has no direct link to their website, which indicates a standard partnership with Trivago. The reasons and possible other partnerships with Booking.com or Trivago will be analyzed and questioned during the interview with the hotel director. (Trivago 2019a.)

Figure 8: Hotel Lamm Hebsack (Trivago 2019a)

8.1.1.3 Individual Interview

The hotel Lamm Hebsack has given all their marketing activities to an external marketing company due to the high amount of knowhow. At the moment the hotel does not employ staff which is familiar with the skills to manage the marketing activities of the hotel.

It generates around 30 percent of their booking over third-party distributors. As the hotel is a rather small hotel it does not provide a reward system as other hotel

in order to increase their direct booking. They talk to every guest that they offer a lower rate when booking directly. The hotel stated that they have noticed an increase of direct booking over the last year. They have also recognized that their guests have booked over third-party distributors and cancelled their reservation in order to book directly and receive the lower rate.

The hotel decided not to work together with Trivago as it would be too expensive for the hotel. Trivago had offered them to use the service where the hotel own website is position on the first position when paying more per click then the competition. The hotel decided not to use that service due to two reasons. As already mentioned, it is too expensive for the small hotel and the second reason is the fact that it does not guarantee a booking.

The hotel enjoys a great amount of business travelers, the hotel is mostly booked out from Monday until Thursday. The companies in the closer surroundings are regulars. With many companies the hotel has a special room rate to guarantee their coming back.

The biggest advantage of those platforms for the hotel is the fact that it generates bookings without much effort. As they do not have anything to do for the marketing and the appearance on those platforms it saves at least one employee. The hotel enjoys a great visibility over the platforms and is able to be booked out almost all around the year. A negative impact are the commissions paid to the platform and the marketing company to be present on the different platforms. (Kübler 2019.)

8.1.2 Best Western Plus Hotel Fellbach

The researcher decided to analyze the online appearance of the Best Western Plus Hotel Fellbach due to two reasons. The first reason is the fact of belonging to a chain where a set of standards are being followed. The second reason is the location of the Hotel as it is outside of Stuttgart in a more rural environment, later during the research another Best Western is being introduced and analyzed which is located in the city center. The Best Western Plus Hotel Fellbach hotel is a 4-Star hotel with the additional the Best Westerns own franchise category named Plus.

8.1.2.1 Introducing the Hotel

Best Western is a hotel chain which was formed in 1946 by an American hotelier Merrill K. Guertin and 66 other hoteliers. Their goal was to recommend their guest to travel to the west of the USA. That goal of recommendation to other locations is still their mission today. Best Western is a hotel chain all around the world with a uniformed quality brand which guarantees the same standards around the world but still offers an individual style of the hotel owner. They are represented with over 4500 hotels in over 100 different countries. To the Best Western portfolio also belong 13 brands which indicate a different standard and classification. Best Western only operates as a franchise company and not its own hotels. Different to other franchise companies Best Western operates as a non-profit organization. Hotels which want to belong to the Best Western group have to fulfill different standards but are able to keep their own identity. With the 13 different brands the hotel director can decide which brand and standard fits best to the location. The Best Western group has a Reward System where guest can join a membership and collect points with every stay in a Best Western Hotel. With the collected points guest can enjoy reduced room prices. (Best Western Hotels Central Europe GmbH 2019a.) The Reward System is the strategy explained in the chapter about the Billboard effect. The guests are trigger with better offers and special benefits when being member of the hotel and booking their stay over the hotel's own channels.

Best Western Plus Fellbach, Germany is a hotel located close to Stuttgart. The Hotel is equipped with 149 rooms in three different categories; standard, comfort and comfort-plus. The hotel is in the category of a 4 Star classification according to the organization DEHOGA. The hotel is a privately owned by Karsten Warth. As mentioned in the introduction of this chapter the different management styles of the hotels was introduced.

8.1.2.2 Their Online Appearance

The hotel has a great rating of 8.5 points out of 10. The complaint management and the customer support are managed by the hotel over the platform booking.com. The hotel replies in great detail to every comment left on booking.com, as it can be seen in Figure 9. After reviewing the prices on Booking.com and on the hotel's own homepage, it shows that the prices are the same.

The previous researched hotels made sure to offer cheaper prices on their homepage in order to increase their direct bookings and reduce the commission paid to booking.com. The Best Western Plus Hotel Fellbach offers the same prices on Booking.com and on their own website. That might be due to two circumstances, the first could be a high season in which the hotel decides to not offer special rates. The hotel would offer lower rates as soon as the high season ended. The second reason might be that the hotel decided not to offer different rates to attract more guests to join the Reward System.

Figure 9: Best Western Plus Hotel Fellbach - Stuttgart (Booking.com 2019b)

When analyzing the online appearance on the platform Trivago it shows the co-operation with the hotel and the website. There is the possibility to buy the Hotel Manager Pro version and have a better handling with the appearance or the possibility to pay more money per click than the competition. Best Western Plus Hotel Fellbach uses one of the services to be the first link a potential guest can use to book their stay as seen in figure 10. (Trivago 2019b.)

Figure 10: Best Western Plus Hotel Fellbach (Trivago 2019 b)

8.1.2.3 Individual Interview

Best Western Plus Hotel Fellbach is more of a business hotel due to the location. It is located outside of Stuttgart but receive many guests during fairs and other events in Stuttgart. Also, many companies use the hotel for their conferences and

meetings. The hotel does not offer different prices on their website due to an internal policy to ensure the guest a reliable service. The guest receives the same room whether it is booked over Booking.com or the own website.

Best Western offers a reward system which is a strategy to increase direct booking and to increase customer loyalty. Best Western is eager to acquire a certain number of new members each year. If the hotel does not fulfill the requirements it receives a fine.

All actions with Trivago are managed by the marketing experts of Best Western as a group, due to many risks with the pay per click situation. The hotel tries to achieve the best possible position on the platform in high seasons but that is managed by the group and not the hotel itself.

Best Western Plus Fellbach needs the platform Booking.com due to the fact that they have a less intense staff situation. They still have personnel but without booking they would need to employ an additional employee. The cost would be almost the same as the commission paid to the platform. Best Western generates around 27% of their bookings over Booking.com, 60% are direct via phone or E-mail and the 13% are divided between other third-party distributor and their own website. The hotel is very satisfied with their current situation and would not be able to handle more direct bookings due. They do try to increase their reward system members to save cost paid to platforms such as Booking.com but wants to keep Booking.com as a strong partner.

The main advantage of the platform is that the hotel saves one salary paid to an additional employee. The difference to the paid commission is rather small. The other advantage is the visibility which is necessary on the competitive market in the area around Stuttgart. Their goal for the future is to work closer together with Google as a search engine as they are currently intensifying their algorithm. (Fleischer 2019.)

8.1.3 Holiday Inn Düsseldorf

Holiday Inn is also a hotel chain belonging to the known luxury hotel group Inter-Continental. The reason the author of the thesis decided to analyze another chain is to find possible differences in the concept and marketing strategies. The Holiday Inn is located in the city center of Düsseldorf.

8.1.3.1 Introducing the Hotel

The hotel belongs to the hotel chain Holiday Inn, with a 4-star classification according to DEHOGA. Holiday Inn is a business unit of InterContinental Hotels Group. The company InterContinental Hotels & Resorts was founded in 1946 as a subsidiary of Pan Am. Their first hotel was established in Belém, Brasil. The first Holiday Inn corporation was formed in Tennessee, USA in 1952. In 1989 the British company Bass Plc bought the Holiday corporation. In 1998 they also bought InterContinental and formed the IHG. Holiday Inn is the biggest business unit with around 1350 hotels around the world. Most of the hotels are managed with the franchise system, unlike the Best Western it is not privately managed. (IHG 2019.)

The hotel has 209 rooms available, in addition it has several business rooms with printers and other office supplies. The hotel has two special offers, the first one is a family friendly overnight stay. Children under 17 years are allowed to sleep in their parent's room for free. Up to four children under 12 years can eat for free in the hotel's own restaurant. With offers like this families are more likely to stay in their hotels, due to special prices for children. The second offer is a reward system. The guest has the possibility to join the IHG Reward Club in order to enjoy cheaper prices and other special offers. With a reward program such as the one from Holiday Inn guests are more likely to stay at different Holiday Inn hotels all over the world. (Holiday Inn n.d.) The Reward Club has the same background as explained in the chapter before. It is a strategy also explained as the Billboard effect.

8.1.3.2 Their Online Appearance

The hotel has a great rating on booking.com with 8.7 points out of 10. The hotel also takes great care of answering the comments left on both their website and those on booking.com. When reading the comments, it shows that they have a quality manager who answers to all comments in person. That makes the guest feel heard and that their opinion is important for the hotel. (Booking.com 2019c.) On their own website they advertise with the best price guarantee (Holiday Inn 2019). When analyzing the prices on booking.com and on their website the statement is proven right as seen in Figures 11 and 12. The prices when booking direct are cheaper, and when being member of their reward club, the guest needs to pay with collected points and receive a great discount as it can be seen in Figure 11 (Holiday Inn 2019).
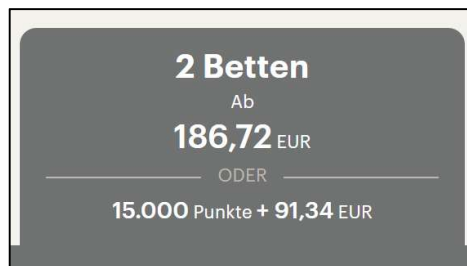
Figure 11: Zimmerauswahl (Holiday Inn 2019)

Figure 12: Holiday Inn Düsseldorf City Toulouser Allee (Booking.com 2019c)

The Holiday Inn Düsseldorf has a great appearance on Trivago as well, with a rating of 8.5 points out of 10 (Trivago 2019c.). The hotel also has its own website as a direct link on the first position, before the other OTAs as seen in Figure 13. The price is the same as other websites offer, but when going to the website the guest can choose a different offer to better prices. As previously explained, it

could mean a special contract with Trivago to appear at the first position. It could also mean the Hotel pays more money per click in order to be placed on top.

Figure 13:Holiday Inn Düsseldorf CIty Toulouser Allee (Trivago 2019c)

8.1.3.3 Individual Interview

The reward system offered by the hotel is a strategy to increase their direct booking. Guests receive special benefits when being member of the system. They receive special treatment such as a late-checkout or an upgrade to a better room. The strategy is to increase customer loyalty. The guest has to book their stay via the direct distribution channels on order to receive those benefits. IHG was one of the first hotel chains to offer such a system, nowadays almost every bigger hotel group has a reward system to compete against the OTAs.

Around 53% of the bookings the hotel receives are direct, meaning they are generated via phone, mail or their own booking system. Bookings generated over OTAs and other third-party distributors are estimated to be around 30%. With those numbers it becomes clear that the OTAs have a great impact on the turnover of the hotel, which would be impossible to compensate when not cooperation with the third-party distributors.

Holiday Inn Düsseldorf tries to be positioned on the top of the list at Trivago during their high season. During the research in June 2019, it was a high season due to why the homepage was listed at Trivago. During those times holiday Inn tries to pay the highest amount per click to receive a good position. That is managed differently every month depending on the demand and season. Other marketing

strategies are managed by the global group IHG such as the contract with Booking.com. The small hotels only have little decision freedom in those decision-making processes.

Holiday Inn could not survive without platforms such as Booking.com or Trivago as they could not compensate the 30% turnover they generate. Those platforms also provide the Hotel with a great way of being visible for potential guest. Being active and communicative over those platforms is the first step of gaining customers. In addition, with the reward system they can increase their direct booking in the long run. It has to be well estimated how much benefits a guest can receive without being more expensive than the fee paid to Booking.com. If that is well calculated the reward system is a great tool to compete against the OTAs. (Schäfer 2019)

8.1.4 Best Western Premium Rebstock

The Best Western Premium Rebstock is a 4-Star hotel in Würzburg, Germany. As mentioned in topic 6.2.3 this hotel was chosen due to the fact that the other Best Western hotel is located in a rural environment and this Best Western in the city center which might show differences in the marketing and online appearance. This hotel is a franchise from the West Western group out of the category Premium, which stands for a higher standard as Plus, which was introduced before.

8.1.4.1 Introducing the Hotel

This Best Western is a 4-Star hotel belonging to the Best Western group which is located in Würzburg, Germany. The thesis writer decided not to introduce the hotel chain Best Western again as it was explained in topic 6.2.3.1. The difference between the two hotels is the franchise category, the hotel located in Würzburg is a Premium. It is located in one of the oldest lodgings in Germany, since 1408 the location served with 70 individual decorated rooms. The hotel has a restaurant which was awarded with several awards from restaurant guides such as Gault Millau. (Best Western Hotels Central European GmbH 2019b.)

8.1.4.2 Their Online Appearance

Unlike the Best Western Plus Fellbach, this hotel does not reply to customers comments on booking.com. They have a high rating with 8.7 point out of 10 on booking.com. (Booking.com 2019d.) When comparing the price of a room on Booking.com and their own website no price difference in noticeable as shown in Figure 14 and 15 just as the previously introduced Best Western. It can be due to the same reasons, either it is a high season or to attract more guest to join the Reward System. Further information to why the hotel manager decided to offer identical prices will be asked during the interview with the management.

Figure 14: Unsere Zimmerangebote (Best Western Hotels Central European GmbH 2019c)

Figure 15: Best Western Premium Hotel Rebstock (Booking.com 2019d)

The hotel has a great rating on Trivago with 8.6 points out of 10, which is the 4-star hotel with the highest rating in Würzburg. Similar to the other hotels mentioned in this work the hotels own website is marked at spot number one on the metasearch platform Trivago, but just like on booking.com the price is the same as on other OTAs, which might not be negative as they have their hotels own website as a direct link on the top of the list. (Trivago 2019d) Let alone this might increase the direct bookings without offering the cheapest price. This question will be analyzed after the interview with the hotels.

Best Western is an independently owned hotel which belongs to the big hotel chain Best Western enjoys more freedom in their marketing strategy as other hotel belonging to a chain has. At the moment the hotel has a big enlargement project, due to that reason they concentrated on answering comments on other platforms first.

During June and therefore the time of the research the hotel offered the same price on booking.com and their own website. That was due to a big event in Würzburg called Mozart Fest. The hotel never offers lower prices during high season. Outside high season they use the strategy of providing lower rates when booking over their booking system.

Best Western Würzburg also offers a reward system similar to Holiday Inn Düsseldorf to motivate the guest to join the club and receive special benefits. Another strategy is to provide the guest with a nicer room when booking directly. The hotel recommends all its guests to join the reward system in order to receive the best offer to the best price.

Social Media Marketing is managed by the central marketing department for the chain Best Western which is located in Eschborn, Germany. They also manage the activities with Trivago and contracts with Booking.com, as explained in the interview with Holiday Inn Düsseldorf. The direct link on the platform Trivago is linked to the general homepage of Best Western as to why it is clear the Eschborn decides to how much they pay per click. As mentioned, during the research was high season in Würzburg, it is possible that the central marketing department decided to invest more marketing budget to generate more direct bookings.

Best Western Würzburg generates about 20% of their bookings though platforms such as Booking.com, HRS or Expedia. Another 20% are received by guests using the Best Western Homepage and the last 60% are via mail or phone. The hotel has many regulars who stay from Monday until Thursday every week, they book their room directly in the hotel. Companies which are located in Würzburg

book their room via mail. Those bookings make up the majority, which puts the hotel in a privileged situation.

Booking.com is one of the most important third-party distributors for the hotel due to the fact that it has a great marketing strategy and provides a platform for the hotel to be visible. The process of a booking is very simple, the hotel only receives the information of the guest and has no work with the communication. That can be both an advantage and disadvantage. If the guest cancels the booking the room is back on the platform for a new guest to book. On the other hand, the guest is anonymous until the day of arrival. That is a very big disadvantage, the communication between hotel and guest is impossible due to privacy protection. The contract is between Booking.com and the guest. (Unckel 2019.)

8.1.5 Der Öschberghof

The thesis writer decided to include this hotel into the research to have an independently owned hotel in the luxury segment in comparison to the smaller privately-owned hotel Lamm in Hebsack. The region this hotel is located is more attractive and known for travelers and for outdoor activities.

8.1.5.1 Introducing the Hotel

This is a privately-owned luxury resorts located in Black Forest, Germany which belongs to the 5-start classification. It is equipped with a 5000 sqm large spa area, a golf course and a large gym. They provide a wide variety of culinary experience in one of their four restaurants, Ösch Noir is a fine dining restaurant, Esszimmer provides international kitchen. The restaurant Hexenweiher is an Italian pizza house and the Övenhütte which provides a rustic alpine experience. The hotels have 126 rooms which are divided into suits, normal rooms and extra room which allow dogs. (Der Öschberghof n.d.)

8.1.5.2 Their Online Appearance

The hotel has a rating of 9 points out of 10 on booking.com, they answer to comments left on the website but only 29 guests left a comment which is very low in

comparison to other hotels such as the Best Western Premium Rebstock which has 504 comments. As most of the researched hotels Öschberghof offers a cheaper price on their website Figure 17 in comparison to booking.com Figure 16. (booking.com 2019e.)

Figure 16: Der Öschberghof (Booking.com 2019e)

Figure 17: Zimmer (DerÖschberghof 2019)

The Öschberghof has an excellent rating on Trivago with strong 9.1 points out of 10. The big difference is that they are not listed with their hotels own website which indicates that they does not work with the services provided by Trivago or another provider pays more money per click. (Trivago 2019 e). This will be questioned during the interview with the marketing manager.

8.1.5.3 Individual Interview

The hotel is represented on various OTAs but only generates around 1% of their turnover from third-party distributors. Around 70% of the bookings are received via phone and email due to the fact that the guest is particularly interested in staying at that hotel. 25% of the bookings are generated over their own booking system which is managed by the HNS (Hotelnetsolution). Only 5% of the guests book their stay over an OTA. That shows that the hotel could compensate the 5% bookings if it would be decided to operate without OTAs. The hotel is listed at booking.com in order to be present and enjoy the marketing activities of the platform. Also being listed at Trivago is only to be visible, but not generate instant

bookings. As long as the percentage of the indirect booking is not rising its will be no interest to change that thinking.

The hotel knows that their market position is privileged and due to that it is not important to work together with special OTAs and metasearch due to the high number of regulars. Their focus lies on other marketing strategies. The hotel is represented on fairs especially in the B2B sector. Öschberghof works with advertisement such as GoogleAds and targeted PR work in order to intensify their search engine results due to their client group.

As the hotel is a high-class spa hotel the connection to the guest is a very important topic in their daily business. The guest is supposed to feel welcomed and special. Guests who book over OTAs are anonymous and with that the special treatment is rather difficult, due to that the hotel enjoys their market position and hopes that it will stay that way. (Ender 2019.)

9 Conclusion

This part of the thesis concentrates on the results of the research and gives a future outlook. The future outlook provides information how hotel will or should operate with the third-party distributors.

9.1 Result

The different hotels and interviews show the importance of the third-party distributors. Each hotel is using the platforms to increase their visibility, which is one of the main advantages what they offer. Hotels nowadays have to be listed on different platforms in order to receive enough bookings to survive. The hotel business is a highly competitive market which increases the need to be visible throughout the web. Every analyzed hotel is listed on the platform Booking.com. Each hotel has a great rating and keeps the contact to the guest. The hotels answer to most of the comments left on Booking.com. The reason for most of the hotels is to generate a good after sales impression. The hotels are actively trying to increase the happiness of a customer with the answer to the comments. All hotels are listed on Trivago, but not one hotel has the Manager Pro version with the justification that it is too expensive and does not guarantees a higher direct booking rate. The majority of the hotels use the pay per click offer. The hotel hopes to be placed on the first position with their own website during high seasons. Every hotel is aware of the risk that another distributor pays more money. It also does not guarantee a booking; the fee is paid as soon as the link is activated. Trivago is not the platform on which hotels put their focus which indicates that it will not succeed in the future.

The majority of the analyzed and questioned hotels generate about 30% of their bookings over third-party distributors such as Booking.com. Nevertheless, it strongly depends on the region and the business of a hotel. Öschberghof only generates 5% of their booking over third-party distributors, they would not need those to survive. That is one of the exceptions in the hotel industry. If a hotel has a unique selling point it might not need the generated bookings over third-party distributors but enjoy the visibility. Other hotels such as the Best Western or Hol-

iday Inn generate between 20% and 30% of their bookings through those platforms, they could not compensate the loss when not working together. When operating with Trivago and being listed on the top of the list with a direct link to the hotels own website it can increase the direct booking. As soon as the guest is not transferred to the own website it increases the indirect booking over a platform the hotel pays commission for. The result could be to have high expenses without receiving many direct bookings.

A great way to increase direct bookings and to increase customer loyalty is when working with a reward system. The hotels notice a higher direct booking when offering special benefits and advantages when being member. Guest tend to revisit those houses more often as they save money and collect points. A reward system only makes sense when being in a chain as there are hotel around the world offering the same value to the guest.

The main advantage of the platforms is the high visibility a hotel receives. When being listed on varies platforms guest are made aware of the hotel. The hotel business is as mentioned highly competitive and therefore crucial to be noticed. The counter part of being listed is the commission paid as soon as a booking is generated. The hotel pays between 15% and 20% per booking, although many facts have to be counted against the commission. One of the main costs which a hotel saves are personnel costs. If a hotel has to process 30% more booking that will increase the need for personnel. Another factor is that when a hotel belongs to a chain it has to pay commission to the group for using the booking system. These additional costs should be calculated. The commission paid to booking.com is mostly still higher but not as immense.

The platform Booking.com invests a lot of money on marketing, which means it indirectly pays for part of the marketing activities of a hotel. Another big advantage OTAs have, is the very user-friendly booking systems. Hotels are not able to simplify the booking process on their own website. Research from the hotel Holiday Inn Düsseldorf showed that guests which book over OTAs do so because of the easy usage.

9.2   Future Outlook

For the future it is necessary for the hotel to be present on varies different online platforms. As the expert of online marketing has said, the OTAs should be used as a door opener for the guest to be attracted. One of the most important steps of a hotel is to achieve that the guest will book the next stay directly. The OTAs should not be seen as a competitor, with the right after sale treatment of a guest they can be very helpful. The OTA can also be seen as a great marketing tool where the hotel has a broad visibility, especially in a highly competitive market-place. An OTA is not always the most expensive partner, when thinking of the offers they provide. Most OTAs have their homepage in varies languages and that can save a lot of money for the hotels when not having to translate their homepage.

Metasearch platforms such as Trivago will have a very difficult future due to the price parity of the OTAs. Guest are not attracted to compare prices as they are the same on every booking platform. Nevertheless, when having an expert on that field it can make sense to invest money per click at the moment. As a pay per click does not guarantee a booking it is high risk for hotels which do not have an expert.

Google is starting their business as an OTA which can have a great influence on the current market situation. Booking.com and Expedia are one of the biggest OTAs which will receive big competition with Google as an OTA.
Trivago and other metasearch platform are possibly decreasing or shifting to become an OTA. TripAdvisor for example changes from being a metasearch platform to becoming an OTA.

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Appendix