

de Carlos, Pablo; Araújo, Noelia; Fraiz, José Antonio

## Article

# The new intermediaries of tourist distribution: Analysis of online accommodation booking sites

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## **THE NEW INTERMEDIARIES OF TOURIST DISTRIBUTION: ANALYSIS OF ONLINE ACCOMMODATION BOOKING SITES**

**Pablo de Carlos,**

Facultad de CC Empresariales y Turismo – Universidad de Vigo

**Noelia Araújo**

Facultad de CC Empresariales y Turismo – Universidad de Vigo

**José Antonio Fraiz**

Business and Tourism Faculty – University of Vigo

### **ABSTRACT:**

Distribution is a key variable in any industry because it ensures the delivery of products and services to consumers. However, over the years businesses have increasingly implemented information and communication technology; this has triggered profound changes in distribution channels. A number of tools have facilitated online access to information and booking for accommodations, flights or other travel products. This has substantially affected the traditional travel agency and tour operator business model. Moreover, new intermediaries have emerged. This paper aims to analyze the importance of current online and retail intermediaries operating in the distribution of tourism. To this end, it highlights metrics from a sample of 50 online accommodation booking portals with the greatest worldwide impact according to a classification published by SimilarWeb for the month of October 2014. In addition, it extensively analyzes the content of sites receiving over 10 million hits throughout this period.

**KEYWORDS:** distribution, tourism, online intermediaries, web analytics, content analysis, accommodation booking websites. Distribution is a key variable in any industry because it ensures the delivery of products and services to consumers. However, over the years businesses have increasingly implemented information and communication technology; this has triggered profound changes in distribution channels. A number of tools have facilitated online access to information and booking for accommodations, flights or other travel products. This has substantially affected the traditional travel agency and tour operator business model. Moreover, new intermediaries have emerged. This paper aims to analyze the importance of current online and retail intermediaries operating in the distribution of tourism. To this end, it highlights metrics from a sample of 50 online accommodation booking portals with the greatest worldwide impact according to a classification published by SimilarWeb for the month of October 2014. In addition, it extensively analyzes the content of sites receiving over 10 million hits throughout this period.

### **1. INTRODUCTION**

Distribution is one of the pillars of the marketing function of the economy (Lambin, 1995) and the renown marketing mix model or 4 Ps. It refers to the way in which a product or service is delivered to the consumer or, in simpler words, it is "the bridge between the producer and the consumer" (Alcázar, 2002). Decisions concerning distribution are strategic. Furthermore, a company cannot easily modify distribution in the short term. In fact, a change in the distribution system indisputably requires a certain period of time (Serra, 2005).

Measures related to distribution affect other areas of the company as well as the rest of the variables (price, product and communication) in the marketing mix (Buhalis, 2000). Distribution is therefore an invaluable tool through which to adjust supply and demand. With it, consumers are allowed to take possession of products at the right time, place and manner (Vazquez and Trespalacios, 1997).

Distribution may, in fact, be even more important for the tourism sector than it is for any other sector or industry. The distribution systems used in this sector, "constitutes one of the elements that distinguishes marketing for services from marketing for tangible products" (Serra, 2005: 321). It aims to make information on tourism services readily available to consumers and facilitate advance reservations (Serra, 2005).



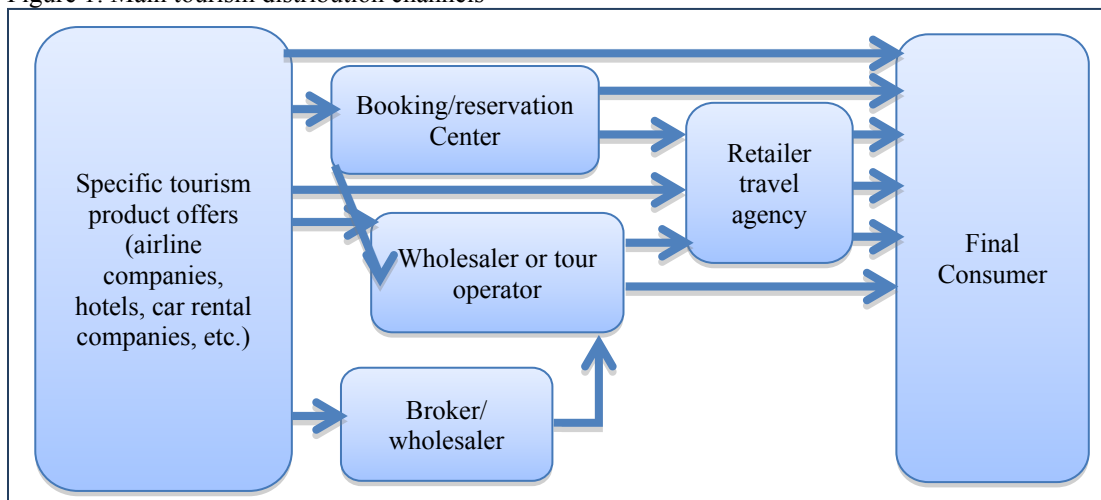
Among others, the following arguments support the special relevance of distribution in tourism and its impact on other company variables (Martin, 1993; Esteban and Reinares, 1996; Seaton and Bennett, 1996):

- A disparity resulting from the geographical distance between the consumer and the product/tourism service that requires the intervention of intermediaries and influences the final purchase of the product.
- Tourism is a global market that cannot be covered by a single company.
- Tourism products have a number of features (intangible, inseparable, heterogeneous and outdated among other things) which makes consumers require a great deal of information prior to deciding to purchase them.
- Tourism is an information business; so the channel disseminates a continuous flow of information among individuals at great distances.

Given that distributing is such an important element, so is the distribution channel, i.e., the system providing the client with access to the company. The channel is a part of the distribution system along with four other entities: the services produced by the distribution, the areas of exchange, the products to be exchanged and the subjects that carry out the exchange (Alcázar, 2002). Access can be physical or virtual and direct (engaging in deals with the producer) or carried out by intermediaries.

The distribution channel structure widely varies from one subsector to another within the tourism sector. Some companies even use multiple channels simultaneously; this is known as the multichannel phenomenon (Alcázar, 2002). The basic structure goes from the product or offer of a tourism product (hotel, an airline, etc.) to the final consumers, i.e. tourists. Between the two there may be no intermediary (direct channel or zero) or one or more intermediaries, among which are: wholesalers, tour operators, reservation centers or retailers, such as travel agencies (Figure 1).

Figure 1: Main tourism distribution channels



Source: self-elaborated based on Serra (2005: 325)

Until the end of last century, the vast majority of intermediary functions were assumed by the travel agent, best known fundamentally through an extensive network of physical stores. Ever since Internet has become accessible to everyone, however, tourist consumption habits have evolved. Travel is precisely one of the most consumed online products. As Buhalis and Licata (2002) said over a decade ago, "tourists now have a greater range of possibilities; they can directly contact providers, continue hiring through traditional Internet intermediaries, buy at specialized portals or make reservations on destination websites" (quoted in Díaz-Luque and Jiménez, 2013: 43). This is why part of the mentioned functions have disappeared or been scattered among well-known intermediaries only present on internet, like Booking, Tripadvisor or Trivago.

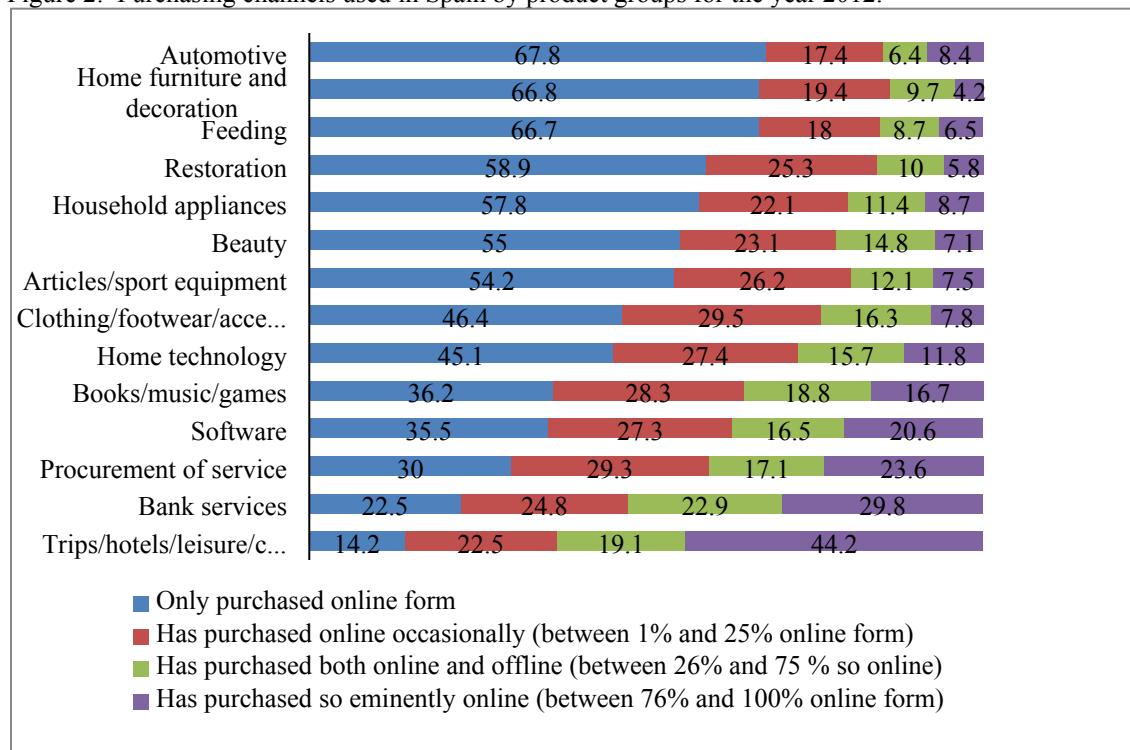
This paper aims to provide an in-depth study on the role of distribution within the *marketing mix* in the tourism sector. It analyzes the relevance acquired and the functions assumed by online travel intermediaries, particularly the best-known belonging to the tourism subsector: accommodation. To do this, section 2 discusses some key aspects concerning the way these virtual agents operate. Section 3 presents the sample and methodology used to determine

relevance and identify the intermediary functions carried out by online accommodation booking portals. Section 4 presents the results of this analysis. Finally, Section 5 outlines the main conclusions of the research.

## **2. ONLINE TOURISTIC INTERMEDIARIES**

The advantages of an online world have encouraged many companies to offer their services through this channel to the point of even opting to do so exclusively through this channel. Purchases through this channel have proven to be one of the most successful for the tourism sector. Specifically, data indicate that a higher percent of the Spanish population expressly buy tourist products online and only a small percent buy them offline (Figure 2).

Figure 2: Purchasing channels used in Spain by product groups for the year 2012.



Source: Experian Marketing Services (2013: 25)

The use of this alternative in the tourism sector has meant, on the one hand, reorganizing the value chain and, on the other, remarkably transforming the way the different tourist agents "collect, use, process and offer the information"(Millán *et al.* 2000: 15). The promotion/progress of TICs in the tourism sector gives "more power to operators, new exchange relationships and more chances to customize services, thus increasing their value"(Walters, 2008: 60).

Internet has become the medium through which suppliers, intermediaries and end-users may quickly access the information they are interested in. It provides suppliers with a way to offer their services directly to the consumer. In the case of online intermediaries, it distinguishes them from traditional intermediaries (Millán *et al.*, 2000). Therefore, all market participants move on internet and the competitiveness of the different suppliers not only depends on the product or service offered; it also depends on their understanding of what online consumers expect from them and how fast and efficiently they deliver these specific demands (Go and Williams, 1993).

Another key factor is the flow of the information through the distribution channel since it is constituted by a "dual output": basic tourist services and information. The consumer demands real-time data on the service features, price, schedules or availability (Millán *et al.*, 2000).

The role of the intermediary is crucial when the supplier cannot directly reach consumers. The intermediary becomes responsible for "obtaining, transforming and providing enough information to consumers concerning the features, price and availability of the tourism product so that they can decide on what is best for them whilst at the same time they become mechanisms for payment and booking" (Mill and Morrison, 1985: 399).

Despite the importance of this agent, several experts (Poon, 1993; Barnett and Standing, 2001; Christian, 2001; Buhalis and Licata, 2002) have predicted that it will vanish precisely as a consequence of direct internet access providers. As a result, the activity of travel agencies (Buhalis and Licata, 2002) or tour operators would be reduced. Yet, other authors reject the likelihood of this happening and, in contrast, claim that intermediaries will continue to operate (O'Connor, 1999), although they will have to introduce significant changes in their business model to exploit the possibilities offered by ICTs. At any rate, tourism consumers are currently increasingly resorting to well-known

portals for booking, reservation centers or OTAs (Online Travel Agencies) and this apparently ensures the survival of retail operators in the distribution channel. Portals like Booking.com (which as we shall soon see, receives over 180 million hits a month), Agoda.com, Myincentivetravel.com or Hotels.com make a wide range of accommodations available to tourists anywhere at any time. Search engines and the screening of large amounts of information provided by these portals allow users to easily find the accommodation they want from any device with net access (laptops, tablets, smart phones, etc.).

### 3. SAMPLE AND METHODOLOGY

In this section we will analyze some of the leading hotel reservation portals in order to assess their relevance, i.e. their key role in approximating the behavior of those who use them and the functions they fulfill as intermediaries. To do this, we have taken some of the notable metrics and contents of the portals with the greatest worldwide impact over the month of October 2014 according to the classification published by SimilarWeb (Table 1). This company measures online behavior, i.e., net traffic. Thus, it provides competitive intelligence services. In particular, we have chosen portals in the category Travel: Accommodation and Hotels (*Travel: Accommodation and Hotels*), given that accommodation is one of the best-known tourism activities.

Table 1: 50 first booking websites in the category Travel: Accommodation and Hotels in the SimilarWeb classification.

POSITIO N	WEB PORTAL	POSITIO N	WEB PORTAL
1	Booking.com	26	Airbnb.ca
2	Agoda.com	27	Edgesuite.net
3	Myincentivetravel.com	28	Hyatt.com
4	Hotels.com	29	Airbnb.ru
5	Airbnb.com	30	Airbnb.de
6	Tripadvisor.co.uk	31	Ibis.com
7	Couchsurfing.org	32	Ritzcarlton.com
8	Hilton.com	33	Bestwestern.com
9	Marriott.com	34	Venere.com
10	Hotelurbano.com	35	Airbnb.com.au
11	Ihg.com	36	Tripadvisor.jp
12	Trivago.com	37	Hotelscombined.com
13	Vrbo.com	38	Natura.com.br
14	Airbnb.co.uk	39	Choicehotels.com
15	Tripadvisor.ca	40	Laterooms.com
16	Homeaway.com	41	Roomkey.com
17	Airbnb.fr	42	Holidaylettings.co.uk
18	Hostelworld.com	43	Airbnb.com.br
19	Starwoodhotels.com	44	Flipkey.com
20	Jalan.net	45	Wotif.com
21	Accorhotels.com	46	Totalrewards.com
22	Travelzoo.com	47	Costcotravel.com
23	Gosur.com	48	Trivago.co.uk
24	Ebayimg.com	49	Sikayetvar.com
25	Hostelbookers.com	50	Trivago.it

Source: self-elaborated with information provided by SimilarWeb.<sup>1</sup>

This paper submits popular reservation portals to two types of analysis. First, it analyzes some notable metrics to assess the relevance of these portals as a means of online travel distribution and explore the behavior patterns of their users. Nowadays, web analytics measures, analyzes and monitors key website performance indicators, i.e. it

<sup>1</sup>[http://www.similarweb.com/category/travel/accommodation\\_and\\_hotels](http://www.similarweb.com/category/travel/accommodation_and_hotels)

measures and analyzes the traffic of a website and is a useful tool for surveillance / competitive intelligence. This work analyzes different data provided by SimilarWeb on the number, origin and behavior of users of the 50 portals listed in Table 1. As these virtual consumers are the final recipients of the distribution channel, these portals constitute the intermediaries they use to obtain information and make the necessary transactions to purchase the product.

Second, it performs a content analysis to assess whether the accommodation booking portals conduct intermediary tourism functions. Content analysis is a research method that is used to evaluate the symbolic content of all forms of communication in a quantitative, objective, systematic and reliable way. This evaluation can be carried out at several levels and may, thus, create a wide field for research (Kolbe and Burnett, 1991). Many studies have used this technique to study the information contained on web pages; some of them focus on the tourism sector. For example, Diaz *et al.* (2008) analyze the effectiveness of the design of the websites of 242 airlines: traditional and low cost; Diaz-Luque and Jiménez (2013) study and marketing information offered on the websites of various Spanish tourism destinations in the three (national, regional and local) administrative levels; and Villalba *et al.* (2014) analyze the design of 243 Spanish tourism portals to determine how they use the technological tools available to them to promote and electronically market tourism products. This paper focuses on the intermediary functions assumed by the top 12 portals in Table 1, which received over 10 million visits throughout the month under study.

#### 4. MAIN RESULTS

##### *a. Analysis of notable metrics*

Several powerful web analytics tools allow us to uncover the volume and behavior of the visitors of websites in different categories. According to the *Website Ranking* data from SimilarWeb<sup>2</sup>, among the 20 most popular websites, 10 belong to the search engine category and 3 belong to social networking. Indeed, one of these networks, Facebook.com, tops the list with more than 21,000 million visits in October 2014. In any case, these 20 sites received 1,000 million or more visits (some of them substantially more) during the month. Within the category Travel (Travel) 4 subcategories are distinguished: Roads and Highways (Roads and Highways), Airlines and Airports (Airlines and Airports), Tourism (Tourism) and Accommodation and Hotels (Accommodation and Hotels), which is what this paper explores. The last two subcategories are the ones with the most sites on the top 10 rankings of the Travel category, namely 4 each.

As shown in Table 2, the 50 portals analyzed in October 2014 received close to 12 million visitors on average. However, if Booking.com (the most visited with a difference of over 120 million people with respect to the next portal in the ranking) is excluded, the average falls to 8.3 million. Only 9 more portals (Agoda.com, Myincentivetravel.com, Hotels.com, Airbnb.com, Tripadvisor.co.uk, Hilton.com, Marriott.com, Hotelurbano.com and Trivago.com) are above the average level of visits. If we consider the average without including Booking.com, we must add two more to this (Couchsurfing.org and Ihg.com). The pages of the category Accommodation and Hotels deal with figures which - although they are important - are far more modest than the ones corresponding to search engines and social networks. In fact, the site that ranks first in the category, Booking.com, "hardly" reached 182 million visitors in the referenced month; it ranks 108th on the global ranking.

However, it seems more appropriate to compare data from accommodation booking portals with a category such as the shopping (Shopping), in which websites sell products, i.e., they also function as a distribution channel. As can be seen in Table 2, the top 50 shopping portals for the month of October 2014 received, on average, over 10 times more visitors than did those for accommodation booking; the duration of the visit was nearly 2.5 minutes greater for shopping sites with almost 3.5 more pages per visit. Consequently, the bounce rate, which measures the number of visits after entering a portal and stopping at one page and leaving, was almost 8 percentage points lower. Nevertheless, data dispersion is very high for visits to accommodation booking portals, although excluding Booking.com substantially moderates the coefficient of variation which remains considerably closer to that of the shopping portals. Dispersion is similar for the other variables, although the coefficient of variation of the bounce rate is much smaller in the case of accommodation booking portals.

<sup>2</sup><http://www.similarweb.com/global>

In short, since these portals sell a specific product / service (hotel room / accommodation), the number of visits to the accommodation booking pages are not negligible. Moreover, the use made of them by tourism consumers reflects their interest.

Table 2: Descriptions of some prominent metrics from the 50 analyzed portals and the 50 first shopping portals.

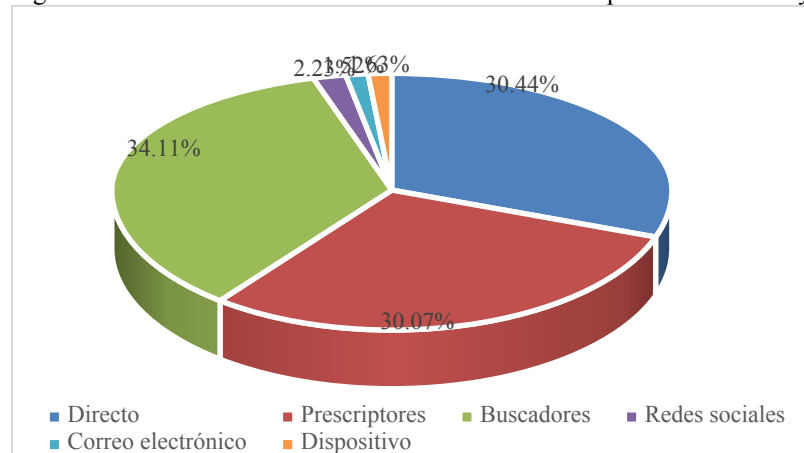
	Estimated visits (October 2014)	Time on site (in minutes)	Pages visited per visit	Bounce rate
ACCOMMODATION AND HOTELS				
<b>Average/mean</b>	11,802,000 (8,328,571)	0:06:04	6.80	39.66%
<b>Typical deviation</b>	26,791,562 (11,366,672)	0:02:35	3.82	16.75%
<b>Maximum</b>	182,000,000 (60,300,000)	0:10:52	14.69	81.49%
<b>Minimum</b>	1,700,000	0:01:14	1.51	16.10%
<b>Variation Coef.</b>	227.01% (136.48%)	42.49%	56.14%	42.23%
PURCHASES/BUYS				
<b>Average/mean</b>	124,068,000	0:08:28	10.21	31.78%
<b>Typical deviation</b>	158,861,474	0:03:18	5.67	15.96%
<b>Maximum</b>	794,500,000	0:15:58	31.33	87.58%
<b>Minimum</b>	22,300,000	0:00:54	1.26	14.91%
<b>Variation Coef.</b>	128.04%	39.07%	55.52%	50.23%

Note: results excluding Booking.com are in parenthesis

Source: Self-elaborated with information provided by SimilarWeb.

Figure 3 shows that, on average, the traffic of accommodation booking portals come from three sources in almost the same proportion: search engines, direct access and prescribers. The other three sources (social networks, email and devices) barely reach 5.3% as a whole. Consequently, direct access is in minority while two of these sources alone monopolize indirect access.

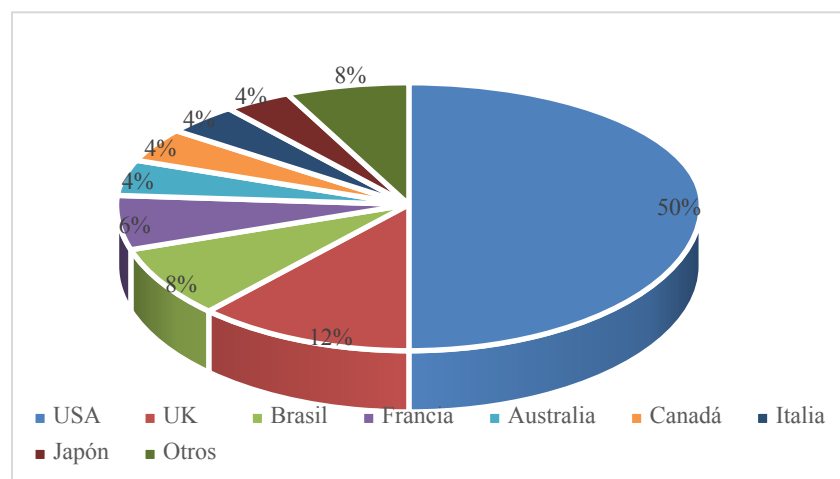
Figure 3: Distribution of the sources of traffic of the 50 portals under study over the 3 last months.



Source: Self-elaborated with information provided by SimilarWeb.

With regard to the nationality of its users (Figure 4), the country of origin of visitors over the last 3 months for half of the portals was the United States. Specifically, this country accounted for 12.16% of visitors to the most popular website (Booking.com), 71.03% of Myincentivetravel.com or 43.46% of Hotels.com; these sites exceeded 30 million visits in October 2014. Far behind the US are the United Kingdom and Brazil, which represent the main countries of origin of visitors in the case of a fifth of the portals. It comes to no surprise that all the weighty countries in Figure 4, except for Japan, rank among the first 10 countries on the worldwide classification by international tourism expenditure (WTO, 2014: 13).

Figure 4: Distribution of the 50 portals analyzed in the main country of origin of visitors over the last 3 months.



Source: self-elaborated with information provided by SimilarWeb

Portals belonging to global domains (.com, .org, or .net) as well as national domains (.uk, .ca, .fr, etc) are among the units analyzed. As expected, in the case of the latter there is a clear prevalence of users from the country accounting for the domain (see Table A.1 of the Annex). It then seems reasonable to analyze whether there is a statistically significant relationship between the type of website according to the weight of the main country of origin of its users and the type of website according to the nature of its domain. These two variables reflect the characterization criteria of the portals and support two groups each:

- Weight of the main country of origin of its users: the *concentrated* group includes portals where the main country of origin of its users absorbs at least 80% of its traffic, while the *disperse* group includes portals where this percentage is below 80%.
- Domain: The *Global* group includes portals belonging to global domains, while the *National* group includes portals belonging to national domains.

Table 3: Contingency table for the variables that reflect the type of web portal according to the weight of the main country of origin of the users and the domain in the case of the 50 portals analyzed.

		Domain		
		Global	National	Total
Weight of the main country of origin of the users	Concentrated	11	10	21
	Disperse	25	4	29
	Total	36	14	50

Note: 0 boxes (0%) have an expected frequency of less than 5. The minimum expected frequency is 5.88

Chi<sup>2</sup> de Pearson = 6.913(p-value = 0.009); Phi = -0.372 (p-value = 0.009).

Source: self-elaborated.

Given the statistical values of the previous contingency table, the two criteria are not independent. That is, the significant, though moderate, association between them is such that Dispersed portals tend to be Global while concentrated portals tend to be National. Unsurprisingly, while for the total sample, 72% (28%) of the portals are the Global type (National); in the case of Dispersed portals the percentage increases (decreases) to 86.2% (13.8%). In the case of the sample integrating concentrated types of portals, the percentage decreases (increases) to 52.4% (47.6%). Analogously, in the total sample, 42% (58%) of the portals are dispersed. This percentage increases (decreases) to 71.4% (28.6%) in the case of the sample of National portals; while in the case of the sample of Global



portals, the percentage decreases (increases) to 30.6% (69.4%). As expected, portals belonging to the domains of a specific country are more visited by users from that country, while a wider range of nationalities visit websites belonging to global domains.

Similarly, it follows to consider whether there is a statistically significant relationship between the type of website according to the main source of traffic and the type of website according to the nature of its domain. To perform this analysis, we have identified the sources of traffic with a variable consisting of three groups, each of which is named after its main users (Direct, prescribers and configurators) and the portal domains to which they access.

Table 4: Contingency table for the variables that reflect the type of web portal according to the main source of user access and domain in the case of the 50 portals analyzed.

		Domain		
		Global	National	Total
Main source of user access	Direct	7	9	16
	Prescribers	14	1	15
	Searchers	15	4	19
	Total	36	14	50

Note: 2 boxes (33%) have an expected frequency of less than 5. The minimum expected frequency is 4.20  
Likelihood ratio = 10.461 (p-value = 0.005); Phi = 0.451 (p-value = 0.006).  
Source: Self-elaborated.

Once again, the statistical value of the contingency table above indicates that the two variables are not independent. There is a significant but moderate association between the two. In particular, the portals of the Searchers groups and especially the Prescribers groups tend to be Global, while the Direct group tends to be national. So, 72% (28%) of the total sample are the Global type (National) portals. However, in the case of the sample made up of prescribers and searchers the percentage increases (decreases) to 93.3% (6.7%) and up to 78.9% (21.1%), respectively; while in the case of the sample composed of Direct type portals the percentage decreases (increases) to 43.7% (56.3%). Similarly, while 32% of the total sample is the direct group, 30% is the prescribers group and 38% is the Search group. In the case of the National sample the first percentage increases to 64.3% and the second and third decrease to 7.1% and 28.6%, respectively; while in the case of Global portals the percentage for the first type drops to 19.4% and the second and the third increase to 38.9% and 41.7% respectively. In short, users tend to directly access the portal domains belonging to a specific country, while indirect access (through search engines and following the recommendations of prescribers) prevails for the portals belonging to global domains. Cultural proximity seems to somehow favor direct access.

Delving deeper into the analysis of the selected metrics, it is worth noting that our findings first of all confirm an intense positive association expected *a priori* among the lists of websites ordered by confirmed length of visits and number of page views, as indicated by the coefficient of Spearman rho (Table 5) and confirm the strong negative association between them and the list ordered by bounce rate. Furthermore, the list of websites sorted by the estimated number of visits was significantly negatively associated to the lists of websites sorted by length of visit and number of page views, and positively associated to the bounce rate. The strength of the association is moderate in all three of the cases, although it is somewhat higher for the number of page views and bounce rate. That is, the more the portals were visited, the lower the intensity of navigation (vice versa). This result suggests that the greater the number of visits to a site, the greater the proportion of visitors who simply surf it, i.e., the higher the proportion of visitors who, at best, make some specific questions or simply take a look at a page, but do not use the search and booking services offered (vice versa). It should be noted that all these correlations, except the one calculated for the lists of websites ordered by testimated number of visits and the number of pages viewed, increased in the case of Concentrated type portals. However, associations were no longer statistically significant in the case of the Disperse type of portals. This suggests that the behavior patterns of users from different countries visiting these sites are heterogeneous.

Table 5. Spearman's rho correlation coefficient between the different analyzed metrics.



	Estimated visits	Time on the Site	Pages visited per visit	Bounce rate
<b>Estimated visits</b>	1	-0,331*	-0,438**	0,431**
<b>Time on the site</b>		1	0,883**	-0,822**
<b>Pages visited per visit</b>			1	-0,809**
<b>Bounce rate</b>				1

Significant at 5% (bilateral).

\*\* Significant at 1% (bilateral).

Source: Self-elaborated.

To complete the information extracted from the metrics considered, we finally analyze whether the behavior of users, represented by two of the least correlated variables (estimated and Bounce rate Visits), is significantly different in function of the type of site defined according to the weight of the main country of origin and the main source of user access. To do this, we applied the Mann-Whitney U test for two independent samples<sup>3</sup>. This nonparametric test does not require a normal distribution of the variables or a random sample.

Table 6: Results obtained on applying the Mann-Whitney U contrast

Variable	Groups	N	<i>p</i>	Midrange
<b>Estimated visits</b>	<b>Concentrated</b>	21	0.022*	19.95
	<b>Disperse</b>	29		29.52
<b>Bounce rate</b>	<b>Concentrated</b>	21	0.026*	20.10
	<b>Disperse</b>	29		29.41
	<b>Direct</b>	16	0.020 (0.0167)	12.31
	<b>Prescribers</b>	15		19.93
	<b>Direct</b>	16	0.011* (0.0167)	13.25
	<b>Searchers</b>	19		22.00
	<b>Prescribers</b>	15	0.430 (0.0167)	19.07
	<b>Searchers</b>	19		16.26

\* Significant at 5% (bilateral).

*p* is the *p*-value corresponding to the contrast (in parenthesis, the risk level ( $\alpha = 0.05$ ) adopted once the Bonferroni correction has been applied).

Source: Self-elaborated.

As shown in Table 6, the number of visits received by the portals of *Concentrated* type is significantly lower than those received by the Dispersed type portals; the same pattern is detected for the bounce rate. Therefore, portals where users are not overwhelmingly provided by a single country (mostly those belonging to global domains) are visited by more users, particularly by users who simply surf. On the other hand, the bounce rate is significantly higher for portals where searchers are the main source of user access than for portals where direct access prevails. That is to say, users that directly access portals navigate more intensely here than they do through search engines; it therefore seems that whoever directly accesses a booking portal intends to use it and not just take a look at it. In the rest of the cases, no significant differences were detected among the different variable groups considered.

<sup>3</sup> In the case of the variable concerning the primary source of user access, made up of 3 groups, an H Kruskal-Wallis contrast was previously applied to independent ( $k > 2$ ) *k* samples (groups). This proved to be significant at 5% only for the bounce rate.

### **b. Content analysis**

This block presents the main results of the analysis of the current functions carried out by online tourism distribution intermediaries. The functions assumed by intermediaries are broadly varied and always fulfill the three basic principles of the channel structure (Stern *et al.*, 1999):

- Distribution channel entities can be deleted or replaced.
- The functions performed along the channel cannot be deleted.
- The functions carried out by eliminated entities must be transmitted either forward or backward.

So, the more intermediaries, the more the functions are distributed; the fewer the intermediaries, the more the functions are assumed by these few intermediaries. Among these functions, the following (from most general to most specific) are worth pointing out (Martin, 1993; Stanton *et al.*, 1996; Santesmases, 1999; Middleton, 1994.):

- Reducing the number of transactions.
- Adjusting supply and demand.
- Creating choices. The Intermediary offers a wide range of possibilities and product combinations or services.
- Conducting marketing activities.
- Transferring the right to use the product.
- Financing. This can go in both directions, towards the consumer and even towards the producer.
- Facilitating sales outlets.
- Giving counsel and guidance to consumers.
- Offering complementary services.
- Receiving and attending potential claims and complaints.

The list of functions presented above provides a basis for the analysis proposed in this section. The possible relationships with the three remaining *market mix* variables (price, product and communication) are tested in the case of the conducting marketing activities function. The remaining 9 functions, with their own respective identification codes, are shown in Table 7.

Table 7: Functions of tourism intermediaries considered.

<b>1 Reduce number of transactions.</b>
<b>2 Adjust supply and demand.</b>
<b>3 Create choices.</b>
<b>4 Transmit the right to use the product.</b>
<b>5 Finance</b>
<b>6 Facilitate sale outlets.</b>
<b>7 Give counsel/advice and guidance.</b>
<b>8 Facilitate complementary services.</b>
<b>9 Receive and attend possible complaints and claims.</b>

Source: Self-elaborated

As shown in Table 8, the degree of compliance of the functions under study is generally high. In any case a lower percentage of accommodation booking portals assumes advising/counseling and guidance and even fewer of them provide complementary services and receive and respond to complaints and claims. In this study only three portals (Hilton.com, Marriot.com and especially Myincentivetravel.com, which only assumes the choice creation) fail to meet three or more of the nine functions. As for marketing activities, almost all of the portals describe the product and report the price, but only Booking.com carries out promotional campaigns offered by hotels.

Table 8: Functions met by the 12 portals analyzed.

PORTAL	FUNCTIONS										MARKETING ACTIVITIES		
	1	2	3	4	5	6	7	8	9	Per	Pric	Prod.	Commu

										cent	e		n.
<b>Booking.com</b>	YES	YES	YES	YES	YES	YES	YES	YES	YES	100%	YES	YES	YES
<b>Agoda.com</b>	YES	YES	YES	YES	YES	YES	YES	NO	NO	77.8%	YES	YES	NO
<b>Myincentivetravel.com</b>	NO	NO	YES	NO	NO	NO	NO	NO	NO	11.1%	YES	NO	NO
<b>Hotels.com</b>	YES	YES	YES	YES	YES	YES	YES	NO	YES	88.9%	YES	YES	NO
<b>Airbnb.com</b>	YES	YES	YES	YES	YES	YES	YES	NO	NO	77.8%	YES	YES	NO
<b>TripAdvisor.co.uk</b>	YES	YES	YES	YES	YES	YES	YES	YES	YES	100%	YES	YES	NO
<b>Couchsurfing.org</b>	YES	YES	YES	YES	YES	YES	YES	YES	NO	88.9%	NO	YES	NO
<b>Hilton.com</b>	YES	YES	YES	YES	YES	YES	NO	NO	NO	66.7%	YES	YES	NO
<b>Marriot.com</b>	YES	NO	YES	YES	YES	YES	NO	NO	NO	55.5%	YES	YES	NO
<b>Hotelurbano.com</b>	YES	YES	YES	YES	YES	YES	NO	YES	NO	77.8%	YES	YES	NO
<b>Ihg.com</b>	YES	YES	YES	YES	YES	YES	YES	NO	YES	88.9%	YES	YES	NO
<b>Trivago.com</b>	YES	YES	YES	YES	YES	YES	YES	NO	NO	77.8%	YES	YES	NO
<b>Per cent</b>	91.7%	83.3%	100%	91.7%	91.7%	91.7%	66.7%	33.3%	33.3%		91.7%	91.7%	8.3%

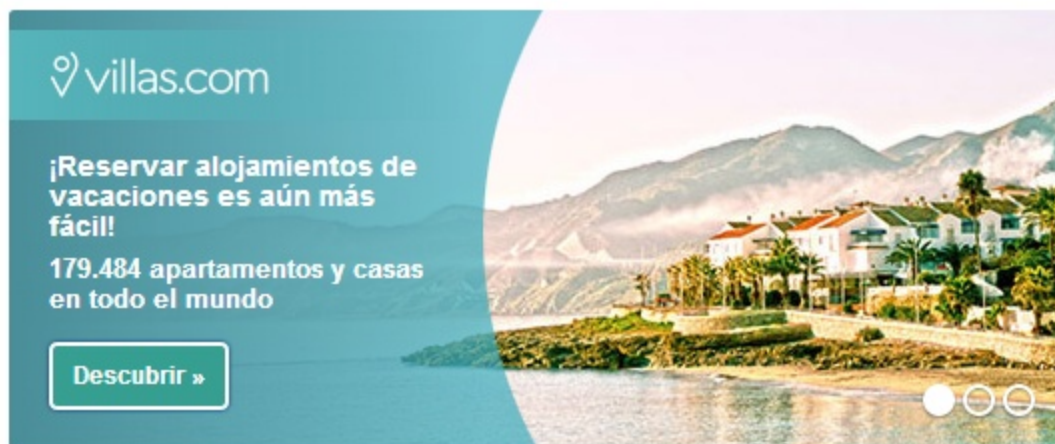
Source: self-elaborated.

Following is detailed evidence obtained by analyzing the content of each portal

- **Booking.com**

The most well-known and visited booking portal across the world. It fulfills the 9 items analyzed, starting with the most common (1, 2, 3, 4, 5 and 6): reduce the number of transactions, direct hotel booking; adjusting supply and demand so that consumers may limit what they want or need through filters (stars, accommodations, services, hotel profile or the scores given to them by other tourists); creating a wide array of choices, offering more than 30,000 hotel establishments only in Spain; transferring the right to use (which is directly sent via email); financing (in most cases there is no prepayment to the hotel); and facilitating sales outlets, since you can book a reservation at almost any hotel through this website. In addition to all of this they also give counsel and guidance (7) on specific hotel products through reviews and ratings from other users (who have stayed at these hotels) as well as on the operation of the Web in "contact" (with the submenu "Customer service"); provide complementary services (8), for example through the car rental service offered by the website itself; and receive possible complaints (9) again through "Customer Service". Concerning its relationship to other marketing variables, all rooms explain the services included (television, internet, air conditioning, etc.) as well as the services added by the hotel (gym, pool, common areas, etc.), so that the product is clearly detailed; the price is also added (specifying whether or not breakfast is included). In terms of communication, facilities or hotel groups like villas.com (Figure 5), for example, are advertised on the website. This site is a very comprehensive one, with applications developed for mobile (both Android and iOS or windows), presence on networks like Facebook, Twitter or Google+ and several menus that make it easier to search, be it by country regions, cities, areas, airports, etc. or themes (beach, shopping, nature, ...).

Figure 5: Ad on Booking.com



Source: Booking.com (2014)

- Agoda.com

This portal offers a selection of hotels worldwide (over 450,000 hotels in more than 47,000 cities around the world). More than 7 million visitors use this website, which adapts its supply and demand (2), reduces the number of transactions (1) and fulfils other basic distribution functions (3, 4, 5, 6). In turn there are over 7 million generated reviews on hotels which provide the customer with advice (7). We must point out that in this case there is an absence of complementary services (8) and direct attention to possible complaints (9), (the customers can always express their opinions, but this is not a complaint management). In terms of the marketing mix, again prices and product features are shown but the website does not carry out promotional campaigns. One last thing to be mentioned here are the numerous languages in which this website may be consulted: a total of 39.

- Myincentivetravel.com

This portal offers two distinct products, hotels and cars. It shows a list of results after a search but redirects the users to another website, hotwire.com, once they make a choice. So the functions of myincentivetravel are very limited: it essentially creates choices (3). It also shows a price but does not give product details.

- Hotels.com

This is a worldwide hotel search portal. Once again all functions are covered but choice creation is well below the 10,000 choices created by Booking.com and TripAdvisor.co.uk.

- Airbnb.com

This Portal defines itself as "a global leader in hosting". It offers everything ranging from rooms to whole houses and unbelievable accommodation, available in over 190 countries and it does so through private owners. It creates a wide assortment of choices (3) and clearly adjusts supply and demand (2) and makes public the availability of numerous hosts and looks for what best suits the needs of each of its visitors. All the necessary arrangements are made through this portal, including payment (1), as well as the rest of the main functions (4, 5 and 6). In terms of counsel and guidance, the user may take a look at the reviews and comments of other users (7). However, this website does not offer complementary products (8) and does not respond to complaints or claims (9). Concerning the marketing mix, it provides price and accommodation details (with photos and text) but the portal is not used for promotional campaigns.

- TripAdvisor.co.uk

Again the most common functions are covered: 1, 2, 3, 4, 5 and 6. It creates choices (3) with over 100,000 hotels in Spain. This is higher than the number of choices given by Booking.com. In counseling and guidance (7) here, once again, visitors may read the opinions of other users. Its complementary services (8) are flights, restaurants and vacation rentals. For complaints (9) there is a "send suggestions or report a problem" function which redirects the user to guidelines, site features, community and technical assistance. The first submenu contains an option called "fraud" where the consumer may explain possible cases of this. As for the *marketing mix* variables, again the product and price are specified, very much in the same way as is done on Booking.com. This website does not

contain advertisements. All hotels are presented in the same format. This portal is also present in Facebook and Twitter.

- Couchsurfing.com

This portal, a community where registered users offer some sort of accommodation, follows the same line as Airbnb.com. The offer is broad and worldwide (3) and visitors may search for whatever interests them (2). As in previous cases, the whole process is performed through this web (1, 4, 5 and 6). As for counsel and guidance (7), again one may resort to the opinions of other users concerning the people who offer accommodation. As a complementary service (8), the portal advertises a timetable of events held in the chosen destination. A menu to manage complaints or claims (9) is not specified. Finally, in terms of the *market mix*, it explains what the accommodation offers along with a number of details about the housing (capacity, whether or not smoking is allowed, if pets are allowed, etc.). This service comes at no cost, so there is no price, and the site is not used for advertising.

- Hilton.com

The Hilton chain offers hotel through this portal. In this case the supply is very limited because the site adheres to the hotel brand (3). It adjusts supply and demand (2) adequately, as expected, since this website is frequented by very select tourists who are searching for this specific type of accommodation. Once on the website, the user can perform all the required transactions (1) and obtain the right of use (4). Advice or opinions of other users (7) and complementary services (8) are nowhere to be found. The portal is a showcase of all the hotels in the chain; it explains the services offered and the starting price for each hotel room. A menu is displayed to manage complaints (9) and, as expected, no brand other than the group brand is advertised on this website.

- Marriot.com

As in the previous case, here the offer comes from a specific hotel chain, Marriot Rewards. Again we are faced with a limited supply of this feature (3) and the adequacy of supply and demand (2) may even be considered insufficient, since it is limited to a trademark in which there is a diversity of hotels and prices (in Madrid alone rooms range from 60 Euros to 280 Euros). In this case, we face an array of customers with different purchasing powers who limit their search to this group when making use of this website. Once on the web, it performs common distribution functions: all transactions, financing, transmission of the right of use and different sale outlet points (Marriot Hotel) all in one portal. Just as in the case of Hilton.com, there were no reviews from other users (7) no menu for claims (9) and no complementary services (8). In terms of the marketing mix, room amenities and prices are explained in full detail.

- Hotelurbano.com

This is a Brazilian portal that offers hotels, cruises and packages in Portuguese language. Nothing new is observed with respect to the previously analyzed portals. It fulfils/covers all of the distribution functions except for complaint management (9) and counseling (7): the visitor may find help on how to use the web but will not find user reviews about the hotels. As for the variables of the marketing mix, product features and prices are explained, but no communication campaigns are carried out.

- Ihg.com

This is the Intercontinental Hotels Group reservation portal. It follows the same dynamics as Marriot or Hilton, but the offer is more varied because it includes several chains (Intercontinental, Crowne Plaza, Hotel Indigo or Even Hotels, among others) and therefore more than 4,600 hotels. It covers the same functions as the aforementioned cases (1, 2, 3, 4, 5 and 6). This website provides reviews from other users (7) and a customer assistance menu with a contact, representing a possible way to manage complaints and claims (9). In terms of the marketing mix, price and products are specified.

- Trivago.com

This hotel price comparer analyzes 238 sites at once. This constitutes one of the clearest examples of creating choices (3) and adapting supply and demand (2). This site carries out a great deal of the distribution functions (1, 4, 5 and 6), including counseling and guidance (7 through reviews from other users). Yet on the one hand it lacks complementary service offers (8) because it exclusively focuses on finding hotels and, on the other, it has no menu to manage complaints. There is, however, a menu where the visitor can contact the web and leave a message. As for the marketing mix, price is displayed and the product is described in detail.

After analyzing the presence of the 9 mentioned distribution functions, a more thorough analysis of the "choice creation" function and "adequacy of supply and demand" was conducted given that these are the functions providing the most information.

In terms of the creation of choice (Table 9), most of the analyzed portals offer accommodation via hotels, the most common product (83.3% of the 12 analyzed websites). All of the other products are distributed evenly and each portal specializes in any one of these given products: flights, cruises, car rentals and restaurants, among others. The most complete portal is TripAdvisor.co.uk, offering a total of 5 different products, followed by Hotelurbano.com which offers 3. Finally let us mention Couchsurfing.com and Airbnb.com, which are both atypical cases and the only sites that do not offer accommodation via hotels. Both offer accommodation in private homes, but they differ in terms of price: Airbnb.com fixes prices, while couchsurfing.com is based on the altruistic members of its network and requires no monetary compensation for accommodation.

Table 9: Analysis of the creation of choice by the 12 portals under study.

PORTAL	HOTELS	FLIGHTS	VACATION RENTALS	RESTAURANTS	DESTINATIONS	CARS	VACATION PACKAGE DEALS	CRUISES	EXCURSIONS	OTHER	PER CENT
Booking.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Agoda.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Myincentivetravel.com	YES	NO	NO	NO	NO	YES	NO	NO	NO	NO	20%
Hotels.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Airbnb.com	NO	NO	NO	NO	NO	NO	NO	NO	NO	YES	10%
TripAdvisor.co.uk	YES	YES	YES	YES	YES	NO	NO	NO	NO	NO	50%
Couchsurfing.org	NO	NO	NO	NO	NO	NO	NO	NO	YES	YES	20%
Hiltom.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Marriot.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Hotelurbano.com	YES	NO	NO	NO	NO	NO	YES	YES	NO	NO	30%
Ihg.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Trivago.com	YES	NO	NO	NO	NO	NO	NO	NO	NO	NO	10%
Per cent	83.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	8.3%	16.7%	

Source: self-elaborated.

However, the use of filters in these sites helps consumers to refine their searches. This is how the site adjusts supply and demand. Price, the number of stars and whether the accommodation belongs to a chain (present in 50% of the sites) are among the most common filters used to help visitors establish their first limitation. Following these are the reviews from other users, the services offered and the profile of the hotel (its location). The attempt to offer users searches tailored to their needs is so great that search engines like Booking.com, TripAdvisor.co.uk and Trivago.com have established 6 or more different search filters (Table 10).

Table 10: Setting filters to adjust the supply and demand in the 12 analyzed websites.



PORTAL	PRICE	STARS	TYPE OF LODGING	ADVICE	SERVICES	HOTEL PROFILE : LOCATION	CHAIN	OTHERS	PER CENT
<b>Booking.com</b>	YES	YES	YES	YES	YES	YES	YES	NO	87.5%
<b>Agoda.com</b>	NO	YES	YES	NO	YES	YES	YES	NO	62.5%
<b>Myincentivetravel.com</b>	YES	NO	NO	NO	NO	NO	NO	NO	12.5%
<b>Hotels.com</b>	NO	NO	NO	NO	NO	NO	NO	NO	0%
<b>Airbnb.com</b>	YES	NO	YES	YES	YES	NO	NO	YES	62.5%
<b>TripAdvisor.co.uk</b>	YES	YES	NO	NO	YES	YES	YES	YES	75%
<b>Couchsurfing.org</b>	NO	NO	YES	YES	YES	NO	NO	NO	37.5%
<b>Hiltom.com</b>	NO	NO	NO	NO	NO	NO	YES	NO	25%
<b>Marriot.com</b>	NO	NO	NO	NO	NO	NO	YES	NO	25%
<b>Hotelurbano.com</b>	YES	YES	NO	NO	NO	YES	NO	NO	37.5%
<b>Ihg.com</b>	NO	NO	YES	YES	YES	NO	NO	YES	50%
<b>rivago.com</b>	YES	YES	YES	YES	YES	YES	YES	YES	100%
<b>Per cent</b>	50%	41.7%	50%	41.7%	41.7%	41.7%	50%	41.7%	

Source: self-elaborated.

## 5. CONCLUSIONS

TICs have revolutionized distribution in many sectors, including tourism. Thanks to Internet, users have the chance to directly access the producer or supplier. Nevertheless, intermediaries facilitate a series of tasks; thus they have a great numbers of users. At the click of a button, the user gains access to a wide range of hotels, flights or even holiday packages, prices, reviews, comparatives, etc. and may finally make the reservation or purchase and comfortably receive it by email. This is why the number of websites operating as industry retailers has proliferated

Analyzing the traffic of these pages and their content seems to be therefore fully justified. This paper has addressed this task by choosing to study/analyze the 50 most popular accommodation booking portals, according to the latest classification published by SimilarWeb. Although the monthly figure for visits to these portals is respectable, it is substantially below the figure for visitors to shopping portals containing several items. Here users spend more time surfing and fewer of them leave after having only consulted a single page. The analysis of some available metrics has corroborated that direct access by domestic users prevails in the case of booking portals belonging to domains of a particular country, i.e., in the case of the portals that are culturally the closest; while access through prescribers and search engines is more common in the case of portals belonging to global domains and it is more heterogeneous in terms of the nationality of its visitors. The evidence also suggests that increased traffic corresponds to a lower intensity of navigation, i.e., an increase in the proportion of visitors who, at best, make some specific questions or simply glance at the page (vice versa). In this sense, the most heterogeneous portals in terms of the nationality of the visitors present these characteristics (a greater volume of visits and bounce rate) more than do the portals where users of a given nationality clearly prevail. Finally, users who directly access portals are found to go beyond the first page they see more frequently than do the users who access via search engines.

In terms of the content analysis of the 12 portals with the greatest number of visits, the features of the distribution functions are broadly carried out and combined into a single web. All of the portals have at least 6 of the 9 functions analyzed. The shortcomings identified are lack of counseling and guidance (and if this does exist it is basically through the reviews of other users), lack of available complementary services and no menu to manage complaints. These may be the points proposed for further future work to improve the functionality of these portals. Delving deeper into the subject, items such as the creation of choice have a great presence, since virtually all portals provide access to a broad hotel base. For example, Trivago.com offers 700,000 hotels worldwide, while Agoda.com or

Booking.com offer more than 500,000. Another important feature of these portals is the adjustment of services tailored to consumer preferences, hence the existence of different filters to narrow down the search. Virtually all portals have filters, especially for price. Yet some have over 8 filters (stars, location, facilities, chain, etc) and serve as a model for the less used or far less-known search engines.

The analyzed results shed some light on the functionalities of accommodation booking websites and user behavior patterns within the tourism distribution channel. It thus seems fitting to take this research a step further by extending the list of websites analyzed or conducting an in-depth comparative study with other online intermediaries.

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## ANNEX

Table A.1: Featured/Notable metrics of the 50 booking portals in the Travel category: Analyzed Accommodation and Hotels from the SimilarWeb classification.

PORTAL	Estimated Visits (October 2014)	Time on the Site (in minutes)	Pages visited per visit	Bounce rate	Main country of origin of visitors for the last 3 months	
					Country	% visits
Booking.com	182,000,000	0:06:49	6.46	46.21%	USA	12.16%
Agoda.com	48,400,000	0:03:22	3.73	70.17%	Thailand	14.23%
Myincentivetravel.com	60,300,000	0:02:29	2.15	38.08%	USA	71.03%
Hotels.com	33,000,000	0:06:03	5.4	40.33%	USA	43.46%
Airbnb.com	15,800,000	0:09:58	13.29	24.37%	USA	65.09%
Tripadvisor.co.uk	22,900,000	0:04:56	4.86	46.17%	UK	74.35%
Couchsurfing.org	11,600,000	0:09:05	12.11	25.47%	USA	19.45%
Hilton.com	14,000,000	0:07:34	6.44	26.99%	USA	73.98%
Marriott.com	15,100,000	0:04:59	5.4	33.91%	USA	83.58%
Hotelurbano.com	18,000,000	0:02:00	2.7	81.49%	Brazil	95.06%
Ihg.com	11,800,000	0:05:30	4.34	40.04%	USA	64.92%
Trivago.com	13,900,000	0:03:17	2.94	65.57%	USA	86.25%
Vrbo.com	7,000,000	0:09:31	10.73	27.92%	USA	89.57%
Airbnb.co.uk	4,800,000	0:09:49	13.48	22.77%	UK	84.06%
Tripadvisor.ca	7,200,000	0:05:30	5.32	45.02%	Canada	87.52%
Homeaway.com	6,200,000	0:06:23	7.06	41.08%	USA	70.42%
Airbnb.fr	4,500,000	0:09:46	12.42	22.29%	France	81.62%
Hostelworld.com	5,900,000	0:07:31	6.42	28.57%	USA	14.82%
Starwoodhotels.com	6,400,000	0:05:23	5.11	34.29%	USA	65.84%
Jalan.net	4,000,000	0:09:06	12.27	28.45%	Japan	91.09%
Accorhotels.com	5,400,000	0:05:45	5.31	34.79%	France	21.32%
Travelzoo.com	6,400,000	0:04:37	3.4	43.51%	USA	61.89%
Gosur.com	7,200,000	0:01:34	1.92	70.19%	Brazil	7.74%
Ebayimg.com	8,000,000	0:01:14	1.51	78.01%	USA	31.58%
Hostelbookers.com	3,600,000	0:04:54	5.42	44.38%	UK	12.26%
Airbnb.ca	2,300,000	0:09:51	14.35	21.45%	Canada	86.34%
Edgesuite.net	5,800,000	0:01:44	2	73.71%	USA	40.56%
Hyatt.com	3,600,000	0:04:21	5.11	34.42%	USA	72.88%
Airbnb.ru	2,000,000	0:10:52	14.52	26.41%	Russia	72.81%
Airbnb.de	2,200,000	0:09:02	11.68	24.50%	Germany	84.96%
Ibis.com	3,200,000	0:05:13	5.05	30.17%	France	20.28%
Ritzcarlton.com	1,800,000	0:04:45	14.69	33.65%	USA	67.77%
Bestwestern.com	3,300,000	0:06:18	4.38	41.74%	USA	77.58%
Venere.com	3,600,000	0:03:51	3.62	44.50%	Italy	21.72%
Airbnb.com.au	1,800,000	0:10:26	13.89	22.11%	Australia	84.99%
Tripadvisor.jp	2,800,000	0:04:25	5.54	49.95%	Japan	72.11%
Hotelscombined.com	2,800,000	0:06:28	5.46	55.80%	USA	20.52%
Natura.com.br	3,200,000	0:04:51	3.86	27.63%	Brazil	97.97%
Choicehotels.com	2,800,000	0:05:37	4.8	30.01%	USA	88.91%
Laterooms.com	2,400,000	0:05:58	6.85	28.65%	UK	79.26%
Roomkey.com	4,400,000	0:01:43	1.63	74.54%	USA	83.21%
Holidaylettings.co.uk	2,200,000	0:08:23	7.7	30.13%	UK	57.18%
Airbnb.com.br	1,700,000	0:10:05	11.45	27.16%	Brazil	94%
Flipkey.com	2,200,000	0:06:37	6.3	35.79%	USA	74.36%
Wotif.com	2,100,000	0:07:48	6.59	25.64%	Australia	80.59%

Totalrewards.com	1,900,000	0:06:00	7.25	24.98%	USA	89.85%
Costcotravel.com	1,800,000	0:07:24	7.9	16.10%	USA	95.20%
Trivago.co.uk	1,800,000	0:07:14	7.84	28.00%	UK	89.72%
Sikayetvar.com	2,400,000	0:03:20	3.86	50.90%	Turkey	97.56%
Trivago.it	2,600,000	0:03:47	3.33	65.02%	Italy	95.56%

Source: Self-elaborated with information provided by SimilarWeb.<sup>4</sup>

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<sup>4</sup>[http://www.similarweb.com/category/travel/accommodation\\_and\\_hotels](http://www.similarweb.com/category/travel/accommodation_and_hotels)