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THE ELECTRONIC COMMERCE IN THE TRAVEL AGENCIES' ACTIVITIES IN BULGARIA AND TERMS OF REFERENCE FOR ITS ELABORATION

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Abstract:

The data used in the paper and the sources of information studied, show regaining of the positions and the role of travel agencies in the distribution system of tourism. The main trends and special features of the European on-line tourist market have been analyzed, as well as the state of the electronic commerce in travel agencies in Bulgaria. Alternatives and values-generating strategies for the intermediary business through efficient use of the advantages of e-commerce have been pointed out.

Key words: Internet, travel agencies, electronic commerce, value.

INTRODUCTION

Tourist industry is dependant on and dominated by Internet, and the sales of tourist travel in the network increase more and more. The following **important trends** can be observed: when choosing a package travel *price turns into a more and more significant factor on the account of quality*; *purchases of tourist packages abroad increase*, as a result of the increase in on-line sales; the information about travel is *being democratized* (there is an increase and popularization of the specialized sites, in which consumers share opinions and evaluation of hotels, travel, attractions, etc. – travel trips, trivop.com); servicing and creation of new unique products *are being personalized* (the consumers plan and assemble their package travel or find an optimal variant for an overnight stay, transport, entertainment, etc.); *the level of the quality* of services, tourists' security and their protection as consumers is lowered.

According to data from the WTO, consumers on Internet are over 1.4 billion. The Network is the major source of information for 80% of Europeans and in the Netherlands and the UK it is of particular importance. In 2007 for the first time in the

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USA the on-line the reservations outnumbered the reservations off-line. According to statistics presented at the tourist conference Travel Com'08 in Chicago, 80% of the American tourists book excursions through Internet. They are more and more unsatisfied by the quality of the services rendered. About 58% of British prefer to reserve their holidays on-line, a 20% use the help of tourist agencies.²

Statistical data from the European countries and the USA show that after the big slump in the number of travel agencies begins a *gradual recovery* of their activities. Data from the American association of travel agencies show that in 1998 their number amounted to 60 thousand; five years later it had dropped down to 25 thousand, and at present there is an increase of up to 30 thousand. The situation in Europe is similar. In the conditions of a globalised and dynamic tourist market, the application of the advantages of electronic trade in travel agencies' activities is a necessary and efficient opportunity for the maintenance and strengthening their positions in the tourist distribution system. In this respect **the main purpose** of the author of the paper is: *to analyze the state of electronic commerce in the travel agencies' activities in Bulgaria and to point out the terms of reference for its enrichment and elaboration.*

NATURE OF THE ELECTRONIC COMMERCE IN TOURISM AND SPECIFIC FEATURES OF THE EUROPEAN ON-LINE TOURIST MARKET

The electronic commerce (e-commerce) is a relatively new economic category, which has been studied and analyzed multilaterally and interdisciplinary. Generally it is defined as *transformation of the traditional trade models into electronic and realization of the business processes by the use of information and telecommunication technologies and systems.*³ In the past it had been developing on the basis of the electronic exchange of data, and its future is determined mainly by Internet.

The electronic exchange of information in tourism has been known for a long time. In the 1960-ties the big international air companies worked out the Computer Reservation System, CRS, aiming at a better control of sales, which goes through different modifications.⁴ Global Distribution Systems, GDS are in the basis of servicing in tourist agent' offices. In the end of the 1980-ties competition between them for dominating positions and market shares was sharpened, which brought about a number of mergers and alliances. Those that survived till now and those used by tourist agencies are: "Amadeus", "Galileo", "Worldspan", "Sabre" and others.⁵

More and more on-line information-reservation systems (IRS), having mainly marketing and distribution functions are being used for advertising and sale of tourist services.⁶ These systems (Expedia, Travelocity, Priceline, Orbitz, Ebookers, Lastminute.com and others.) are "virtual tourist hypermarkets"⁷, which have a direct access to one or several CRS/GDS. In the tourist chain of values, on-line IRS are

² Казасов, В. Портрет на съвременния турист в Европа. Hotels & Restaurants Magazine, бр.4, 2008, с.50.; сп. Гранд хотели, юни, 3/2008, с. 8.

³ Данько, Т. и др. Електронний маркетинг. М., ИФРА – М, 2003, с.17.

⁴ International Travel & Tourism Training Programme. IATA, Montreal-Geneva, 2006, pp. 63 – 66.

⁵ Alford, Ph. Global Distribution Systems. Travel & Tourism Analyst, May, 2006, p.3 – 46.

⁶ Коджаиванова, А., Димитрова, К. Online резервационните системи – най-модерният начин за продажби. Hotels & Restaurants Magazine, бр. 2, 2008, с. 14 – 16.

⁷ O'Connor, P. Online Intermediaries – Revolutionising Travel Distribution. Travel & Tourism Analyst, February, 2003, p. 3 – 21.

defined as the new intermediaries on the tourist market, performing additional distribution interaction between CRS/GDS and the final consumer. Thus a new distribution channel is formed, services of intermediaries are avoided and their potential markets are limited.

The development of e-commerce in tourism is determined by the necessity to support and help the growth of the real and the virtual tourist market. That is why tourist companies need communication network, which guarantees their competitive advantages, satisfies to a maximum extent customers' needs and optimizes the corporative structures.⁸ E-commerce in tourism includes business deals (transactions)⁹, which are realized through telecommunication systems, the most used of which is Internet.¹⁰

In the context of the travel agencies' activities, trading by electronic way is related to the elaboration of integrated informational, technological and functional practices for electronic commerce of tourist services. The application of these practices is directed towards: presenting tourist services/products; advertising traditional and new tourist offers; studying the opinion of the consumers; facilitating the communication with partners and suppliers; reducing time and expenses for the preparation of package travel; cutting commissions by keeping direct links to the consumers; studying the competition, etc.

Data from a research carried out by Eurobarometer among the 27 member countries of the EU, related to electronic trade, show that it is the most popular channel for distant sales – on average 33% of Europeans (every third one) have shopped on-line for the last year. The Danish tourist companies expect up to 50% of their sales to be realized via Internet in 2008.¹¹ The highest confidence to on-line trade have the citizens of Sweden, Finland and Denmark, and the lowest – the Romanians and the Bulgarians.

The different tourist markets in Europe are influenced in a specific way by the activating e-commerce. In Denmark after the drop of sales of tour-operators and intermediaries, one can observe strengthening of their positions. In Belgium sales of tourist packages through agents have increased as well, the rate of growth being from 35 to 40%. The Hungarian association of tour-operators and tourist agents states that the main problem, caused by the development of the electronic commerce is the lack of a law framework for the sales in the network, which should be regulated by a new directive. The opinion of the Austrian tour-operators is that there is a new generation of consumers, which had grown up with Internet and they are not interested so much in the guarantees, which organizers give.

The most important modern **features** of the European tourist market, as a result of the development of electronic trade, could be systematized as follows:

- increasing the level of complexity and sharpening the competition on the market;
- offering products simplified to the most, which are a matter of a big competition, because the only determining element is their price;
- increasing the sales of two-component travel in the net (plane ticket and accommodation; accommodation and rent-a-car);

⁸ Bönke D., Krömer M. Effects of Electronic Commerce in Tourism. <http://www.biba.uni-bremen.de>.

⁹ Transactions are regarded as diverse processes of purchase and sale or as exchange of products, services and information, with the help of computer networks, where Internet belongs.

¹⁰ Si-ging Liu, A Theoretic Discussion of Tourism E-commerce. <http://icec06.net/icec06sample.pdf>.

¹¹ <http://pazari.dnevnik.bg>, 24.06.2008.

- increased number of buyers who purchase from foreign intermediaries;
- considerable slow down as far as the protection of consumers is concerned, compared to the fast development of the tourist market; tourists are less protected, especially when they buy from foreign agents, because of the differences in national legislations.

STATE OF THE E-COMMERCE IN THE BULGARIAN TRAVEL AGENCIES

The analysis of the state of e-commerce in travel agencies' operations in our country is made on the basis of data for the period 2000 – 2005.¹² The number of companies offering intermediary services increased by 23% in 2005, which is the biggest increase for the period. Intermediaries have a considerable contribution for this increase, because they form 65% of the retailers. At the end of the period the biggest increase in their number was marked – 40% compared to 2004. (table 1).

Tour-operators increased by 6% in 2005 compared to the previous year, but their share is low – just 1.8%. Most often tourist companies developing their business in the field of retail trade, register as travel agents and realize their intermediary business, because the expenses on their registration are less than those of the tour-operators. In order to be profitable and efficient, many retailers in tourism combine the two main activities – organizational and intermediary within the limited number of Bulgarian consumers of tourist services.

On-line sales of tourist services started in 2003. The main reasons for that delay were the low level of Internet communications in the country, the poor use of credit cards with on-line transactions, the lack of experience, guarantees and protection of consumers, etc. After 2003 the e-commerce (direct and indirect sales) with tourist services has increased by over 4 times till 2005 and has about 8% of the total amount of realized on-line transactions (table 2).

Favorable factors for this increase are: the increased number of Internet consumers; the increased use of credit cards; the changes in customers' conduct, already being positive towards facilitated ways of purchase and sale. Revenues from direct sales for 2005 were almost 3% of the total amount of sales and have doubled since 2004. Most of the direct suppliers have their own web-pages, which main purpose is mainly informative, and not realisation of purchase of sales and payments. Other services, offered by those sites are the on-line reservations.

Low-cost carriers help for the considerable increase of Internet transactions, because they sell their airplane tickets mainly on-line, realizing at the same time their policy for cutting costs. Sales through intermediaries constitute 5% of all transactions realized in 2005. (almost twice more than the direct ones). The considerable growth of over 4 times compared to 2003 is due to the sales of airplane tickets through agents.

¹² Research "Travel and Tourism – Bulgaria". <http://www.portal.euromonitor.com>

Table 1: Number of travel agencies (2000 – 2005)

	2000	2001	2002	2003	2004	2005
Intermediaries	944	1 051	1 214	1 441	1 738	2 434
Tour-operators	52	54	57	59	62	66
Exch. offices	1 153	1 194	1 224	1 236	1 232	1 226
Total:	2 149	2 299	2 495	2736	3 032	3 726

Sources: State Tourism Agency, Bulgarian tourist chamber (BTC), Euromonitor International.

Table 2: Revenues from e-commerce of tourist services (in millions of BGN.)

	2003	2004	2005
Electronic sales, including:	25.5	56.3	112.3
- <i>direct</i>	8.9	19.8	39.8
- <i>through intermediaries</i>	16.6	36.5	72.5
Others	1,031.5	1,175.8	1,318.5
Total:	1,057.0	1,232.1	1,430.8

Sources: BTC, Euromonitor international, branch interviews

Accommodation, combined with flight, traditionally occupies the greater part of sales on Internet – 65% of total revenues (table 3). The second place is occupied by the sales of package travel with 18% of the total. Their share is not big, because with reservations on Internet, certain packages are a bit more expensive. With approximately 9% of overall sales are the revenues, realized by rent-a-car, followed by the sales of airplane tickets – with 6%. Revenues from sales of dynamic travel¹³ with purpose tourism have been accounted since 2005 and their share is insignificant.

The intermediary business in the country is realized by a great number of small companies and almost 2/3 of the tourist agents have been registered in the four biggest towns in the country – Sofia, Varna, Plovdiv and Burgas.¹⁴

The main part of the sales in 2005 – 809 million BGN has been realized by 20 of the biggest Bulgarian tourist companies, most important of which are: Albena tour, Bulgaria VIP Travel Agency, Balkan Holidays Group.¹⁵ These are the leading travel agencies for the period examined, and the biggest number of offices are possessed by Diligence express (23), Alma Tour (12) and Odans travel (6) (table 4).

¹³ A modern trend in tourist supply. Tourists buy themselves single services by different suppliers and form their package. The price is based on the current availability of services, which are traded mainly on-line. *сп. Туристически пазар*, бр.3, 2007, с.22.

¹⁴ Нешков, М. Пътническите агенции в България. *Туристически пазар*, бр. 5, 2007, с. 22.

¹⁵ Изследване „Travel and Tourism – Bulgaria”, <http://www.portal.euromonitor.com>.

Table 3: Revenues from e-sales by types of (in millions of BGN)

Revenues from :	2003	2004	2005
- accommodation	15.1	33.3	73.2
- packages	2.7	10.4	20.4
- rent-a-car	3.2	6.4	9.5
- airplane tickets	4.3	5.2	6.4
-other means of transport	0.2	0.5	0.8
- dynamic packages	-	-	0.4
- others	-	0.6	1.6
Total:	25.5	56.4	112.3

Sources: BTC, Euromonitor International, branch interviews

Table 4: Market share of Bulgarian travel agencies

Tourist companies	Number of offices	Market share (%, 2001)	Market share (%, 2002)	Market share (%, 2003)	Market share (%, 2004)	Market share (%, 2005)
Albena tour	4	7.4	7.6	8.0	8.2	8.4
Bulgaria VIP travel	6	6.7	6.8	7.0	7.5	8.0
Balkan Holidays	2	3.0	3.1	3.3	3.5	3.7
Balkantourist	4	2.8	2.8	2.7	2.7	2.9
Diligence express	23	2.2	2.2	2.3	2.4	2.3
Alma tour	12	1.8	1.8	1.7	1.8	2.0
Geografsky sviat	3	1.8	1.8	1.7	1.8	2.0
Bohemia	1	1.5	1.5	1.6	1.7	1.8
Alder travel	1	1.6	1.6	1.6	1.7	1.7
DM travel	1	1.3	1.3	1.3	1.2	1.4
Orient travel	2	1.3	1.3	1.3	1.4	1.3
Bulgaria travel	1	1.2	1.2	1.3	1.4	1.3
Odans travel	6	1.1	1.1	1.0	1.1	1.2
Easy travel	1	0.8	0.8	0.9	1.0	1.1
Aerotravel	2	1.0	1.0	1.1	1.0	1.0
Euroholidays	1	1.0	1.0	0.9	1.1	1.0
New Balkan Tours	2	0.7	0.7	0.8	0.9	0.8
Rual	2	0.5	0.5	0.6	0.7	0.7
Renaissance	1	0.3	0.3	0.4	0.4	0.5
Premier Tours	1	0.2	0.2	0.3	0.3	0.4
Others	-	61.8	61.4	60.2	58.2	56.6

Sources: BNB, Euromonitor International, branch interviews, company research.

The tourist companies represented in table 4 – main units in the field of intermediary business, increase or retain their market share for the period observed. They are engaged in both types of activities – intermediary and organizational, with the exception of Alder travel, Orient travel and Bulgaria travel, which are typical tour-

operators. Leader among organizers is Albena Tour, who have increased their market share by 1%. Bulgaria VIP travel occupy the second place, registering the biggest increase of their share – 1,3%. With the exception of Balkan Holidays (3.7%) for the period examined, the other travel agencies have a market share of less than 3%. The small travel agents dominate on the domestic tourist market and are intermediaries between a limited number of organizers of tourist travel and the companies, managing the Bulgarian resorts.

In the end of the 1990-ties, the first travel agencies published their own web-pages on Internet. In the catalogue of the Bulgarian Internet portal Dir.bg in “Tourism and holidays” section are presented approximately 1/3 of the total number of registered organizers and intermediaries in Bulgaria. Search for information and purchase and sale of single tourist services and package travel are realized through the web pages of the tourist intermediaries. The analysis of their structure by functional elements¹⁶ eases the interaction with the final consumer in the modern and extremely competitive virtual environment. The structural analysis and the evaluation of the mainly informative sites of the Bulgarian travel agencies, show their moderate level of functionality and the supporting role for intermediary business.¹⁷

Out of the Bulgarian enterprises of this type monitored, about ¼ have worked out Internet pages with profound and varied information about the characteristics of the products offered and the destinations presented. On average, 33% of sites of the travel agencies reviewed opportunities for a comparison of the product features and the prices. Often they are not quite clearly structured, which embarrasses customers with less experience in on-line sales and leads to uncertainty or refusal of purchase. Extremely small is the number of pages of the Bulgarian intermediaries, offering a creation of company on-line community of consumers, who communicate with each other and the agency; exchange opinions, etc. On-line payments are not quite widespread - only 15% of the tourist agencies presented in the research offer such an option.

CONCLUSIONS AND RECOMMENDATIONS

E-commerce in the travel agencies' activities in Bulgaria is in its initial stage of development. No dramatic decrease in their number can be observed. The amount of the real intermediary business has not been considerably influenced by the processes in the global network compared to the USA and the developed European countries. Trading tourist services electronically is an additional opportunity for a quick, easy and efficient access to global markets, which should not be neglected. 36% of the European tour-operators offer on-line reservations, and 40% of the intermediaries enhance customers to organize their holidays totally via Internet.¹⁸ The lack of trust and experience in the Bulgarian customer, the poor application of payments by credit cards

¹⁶ The functional elements on the basis of ICAM (Internet Commerce Adoption Model) model, worked out by Burgess and Coopers, <http://www.inst.co.uk/papers/small.html>

¹⁷ “Internet and Intermediaries in the Tourism Distribution Channel” research, which comprises 400 Bulgarian tourist agencies and 220 on-line intermediaries using the database of www.Dir.bg and www.yahoo.com respectively.

¹⁸ Интернет ще промени основно туристическата индустрия. сп. Туристически пазар, бр. 3, 2007, с. 23 – 24.

on Internet, are the main reasons for the low number of travel agencies in the country that develop e-commerce. They make use of its advantages only to maintain the existing real business, and not the virtual one, thus distinguishing them from the world trend.

The main reason for the regaining of positions of the American and European travel agencies is that after the initial euphoria for avoiding intermediaries and direct shopping in the network, tourists see the **disadvantages of on-line** sales: lower security level; lack of protection against unconscientious actions; worsening the quality of services and others. Sometimes consumers perceive with mistrust too low prices on Internet and prefer to shop via intermediaries that are known and recognized on the market. The modern role of tour-operators and intermediaries increases also because of the greater security offered, the consulting services and assistance to customers when they choose the travel.

The alternatives for the future of the travel agencies in Bulgaria are related to:

- appropriate choice of partners and suppliers on the basis of a flexible contracting;
- a clear definition of the strategies and the company purposes with regard to e-commerce;
- a precise definition of the targeted market segments for real and electronic business;
- a clever use of the competitive advantages of own services, offered for on-line sale at dynamic prices;
- a combined use of varied distribution channels aiming at enlarging the potential markets;
- increasing the level of functionality and interactivity of the Internet pages of the tourist agencies¹⁹;
- research and classification of specialised tourist sites according to customers' needs and requirements;
- use of the virtual for a change and elaboration of own services and increase of their competitiveness.

The expected effects from the realisation of the **advantages of e-commerce** in the tourist agencies' activities are mainly related to: the optimization of the travel organizers' activities by programming differentiated approaches to electronic purchase and sale; tourist offering at attractive prices, result of a mixed calculation and direct reservations²⁰; directing intermediaries towards untraditional and individual products, specialised by types of tourism, destinations or target segments, where the necessity of their consulting and information services is considerable. The prognoses are that with the activation of demand in the last trend, prices of products will go up.

The possible **strategies** for choosing, which *generate value* for intermediary business can be synthesized as follows:

¹⁹ Коджаиванова, А., Казасов, В. Дизайнът на уебсайта. Hotels & Restaurants Magazine, бр. 8, 2007, с. 46–47.

²⁰ Leading tour-operators – TUI, Thomas Cook, Thompson, Club Med, Nouvelle Frontiere are presented on Internet with a varied offering of package travel at dynamic prices, on the basis of a flexible contracting with more suppliers.

- **deriving value** – the implementation of this strategy increases the efficiency of the travel agencies' activities and reduces costs; it is concretized with the automation of certain processes and accomplishment of services by the clients themselves – for example a hotel registration or pre-flight registration;
- **prognostication of value** – data, necessary for prognosticating and for making adequate managerial decisions are an example for this strategy; the varied information for clients, competitors and realized sales are accumulated and used for marketing and distributional purposes;
- **adding value** – this strategy contains a linear combination of services and products in order to create better product combinations; the link of mobile services and the existing web pages for advice and consulting the tourists during the time of their travel is an example in this respect;
- **creation of value** – the accent of this strategy is on the network of differentiated effects, which causes the e-commerce in tourism; an active participation of the customer when choosing the services and planning a tourist travel to a certain destination, for example creating a package travel, in which the combination of services is formed by the consumer on the basis of individual selection.

The application of the strategies reviewed, changes not only the business processes, but increases the opportunities for creation of new services by diversification of the variants for personalization and precise definition of products of the travel agencies. Personalization is related to the process of individualization of the choice of certain services, included in the tourist package. A matter of a précised definition constitute the different combinations of basic and additional components (services) as part of integrated tourist offers.

CONCLUSION

Travel agencies' ability to successfully realize services, which include additional value and usefulness for customers is of particular importance for the improvement of their activities under the conditions of e-commerce. The reprogramming of business processes and the technology of servicing should be aimed at attracting new consumers, satisfying their needs and increasing the number of loyal customers. Gaining trust and guaranteeing their protection for a long term, will strengthen the position of intermediaries in the distribution chain of tourism and their competitive advantages.

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