



## A Competitive Analysis of E-Distribution Systems in the Hospitality Industry\*

### *Konaklama Sektöründe E-Dağıtım Sistemlerinin Rekabet Analizi*

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#### Abstract

The goal of this study was a competitive analysis of global e-distributors in the hospitality industry. It specifically on Airbnb a peer-to-peer booking model, Booking.com an online travel agent retail booking model, and hotel websites, a customer direct booking model. Hospitality e-distribution systems were assessed using the Five Forces Model, a tool for analyzing the competition of a business, to determine the current dynamics and predict the future implications. In this regard, a focus group study was conducted with a group of tourism scholars and experts working in the tourism industry. Based on the findings of this qualitative research, the paper discusses how each system fills the demand in the changing competitive landscape. The study contributes to the literature by producing a detailed analysis of the dynamic nature of distribution in the hospitality industry from a strategic perspective.

**Keywords:** Digitalization, hospitality industry, e-distribution, competitiveness, five forces model

**Paper Type:** Research

#### Öz

Bu çalışma, ağırlama sektöründe global elektronik dağıtım kanallarının rekabet analizini yapmayı amaçlamaktadır. Özellikle konutları içeren bir rezervasyon modeli olan Airbnb, bir perakende rezervasyon modeli olan Booking.com ve doğrudan müşteri rezervasyon modeli olan otel web siteleri çalışma kapsamında değerlendirilmiştir. Konaklama e-dağıtım sistemleri, bir işletmenin rekabet analizini yapmak, mevcut dinamikleri belirlemek ve gelecekteki uygulamaları öngörmek amacıyla kullanılan Porter'ın 5 Güç Modeli ile analiz edilmiştir. Bu bağlamda, bir grup turizm akademisyeni ve turizm sektöründe çalışan uzman ile odak grup görüşmesi gerçekleştirilmiştir. Bu çalışma, nitel araştırma bulgularına dayanarak her bir sistemin değişen rekabet çevresinde talebi nasıl karşıladığını tartışmaktadır. Çalışma, konaklama sektöründe dağıtım sisteminin dinamik yapısı üzerinde stratejik bakış açısıyla detaylı bir analiz yaparak literature katkı sağlamaktadır.

**Anahtar Kelimeler:** Konaklama sektörü, e-dağıtım, rekabet gücü, dijitalleşme, 5 güç modeli

**Makale Türü:** Araştırma

#### Introduction

Considering its impact on the overall economy and business world by the digitalization of information (Evans and Wurster 1997), information technologies (IT) have changed the whole nature of doing business together with its structure, design, strategy, and model. On the other hand, the attitude on how to consume has evolved in line with societal change from a traditional, long-term life strategy to a more liquid and adaptable lifestyle (Kathan et al. 2016:665). In the case of the hospitality sector, the joint effect of such changes fosters a new consumption trend towards more flexible as well as more personalized options. Consequently, hospitality companies are increasingly relying on IT to address new consumer demands, values,

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and expectations. According to a recent industry report, since “consumers want authenticity, personalization, removal of friction, and on-demand functionality in their travel experiences”, the companies in this industry-first “...envision the customer experience they want to deliver” and then, “they can explore the technology options best suited to support their goals” (Deloitte 2017)

IT alters not only the relationship between businesses and consumers but also forges a closer relationship among consumers through network-based communities. For instance, because consumers seek many sources of information at the booking stage, they tend to rely on the user-generated reviews before making their final decisions (WTO 2014:26). Considering the difficulties of pricing information and the existence of alternative ways to obtain it freely, IT challenges business models (Teece 2010:174) by transforming the existing models into a more digitalized version (e.g. e-distribution systems) or creating brand new ones (e.g. home-sharing platforms) in the hospitality industry.

Considering the increasing need for the analysis of new structures in the hospitality industry from a strategic management mindset (Harrington et al. 2014:793; Phillips and Moutinho 2014:98), this study attempts to illuminate how e-distribution systems are impacting how lodging rooms are defined and booked through various booking platforms. Technology advancements have aided the introduction of new business models as well as revolutionized service marketing through digital platforms. Explicitly, distribution channels in the hospitality business have been threatened by the expansion of Airbnb, which has forced them to look for alternative ways to create value for the customers. As market competition has demanded, distribution channels have endeavored to adopt creative and innovative approaches to successfully reach out to potential customers. To maintain their market share e-distribution channels employed improvements, as the structure of the competition has changed and started to threaten the existing businesses. The current study makes a unique contribution by elucidating the many opportunities and challenges that arise as a result of the hospitality industry's transformation of e-distribution systems. In analyzing the new competition structure, the study is divided into several sections. First, the Five Forces Model of Porter is explained briefly. Then, cases that represent, and capture the dynamics of this digital transformation and their backgrounds are explained. Then the findings of the focus group methodology are analyzed and interpreted based on the given model. Finally, the insights drawn from the findings are reported in the discussion section.

## **1. Hospitality Industry Analysis and E-distributors**

E-distribution systems become the critical actors depending on the increasing supply and demand in the hospitality industry (O'Connor and Frew 2004:180). Numerous industry winners employ all available e-platforms to distribute tourism products in the most appropriate way for their target markets. (Buhalis and Licata 2002:219). Gössling (2016:1027) classifies these platforms as sharing/peer-to-peer marketplaces and online reservation systems. E-distributors such as Booking.com, Expedia.com, and lastminute.com as one of the pioneer actors in the hospitality industry (Buhalis and Law 2008:613) take the advantage of the deployment of ubiquitous e-businesses and IT-related solutions. Although the e-distribution systems threaten the traditional channel members (Tse 2003:457), they make the worldwide tourism properties accessible online. Together with tourism suppliers (e.g. hotels or airlines), e-distributors contribute to the growth of the tourism sector, which according to UNWTO (2016:2) accounts for seven percent of the world's exports in total, up from six percent in 2014. As an indicator, Priceline Group doubled its net income in 2011 (Priceline 2016) and Airbnb tripled its revenues in 2013 (Kokalitcheva 2015). Despite their impacts on the growth and appeal of the sector, we have little understanding of how industry dynamics affect the current as well as future of these e-distributors. Grounding their viable business models on IT, the e-distributors capture the changing consumers' mindset, and the current state of this industry must be analyzed from their point of view.

Factors that affect how a company obtains a competitive edge and maintains its superior position, in the long run, have been the primary interest of the strategic management community. Scholars, practitioners, and consultants in this community have provided diverse recipes and different approaches since the 1950s. According to Hoskisson et al. (1999:417), these approaches swing like a pendulum between internal resources and external factors. Guerras-Martin et al. (2014:71) add a second dimension to the Hoskisson et al.'s (1999) famous metaphor and classify the evolution of research efforts in the field as micro and macro. Here, the analysis of the competitive nature of a sector and its implications on individual firms falls into the macro/external quadrant, which highlights the perspectives of industrial organization; transaction costs economics, and institutional approach.

Porter's Five Forces Model (1979; 1996), based on the former viewpoint, can provide one of the greatest industry-level evaluations. Although the model partly ignores the impact of macro-environmental factors (economic, social, political, etc.) on a specific industry, it can assist in predicting an industry's long-term growth and attractiveness by examining its dynamics (Grundy 2006:215). Moreover, the model broadens "the supply-demand analysis of individual markets" by involving rivals, potential entrants, and substitutes in the analysis (Karagiannopoulos et al. 2005:69). Therefore, it is frequently utilized in industry analyses such as banking (Siaw and Yu 2004:514), health care (Pines 2006:447), higher education (Martinez and Wolverson 2009:23; Mathooko and Ogutu 2015:334), services (Ou and Chai 2007:477), or energy (Yunna and Yisheng 2014:798), etc. The model is also used to assess the tourism industry's overall competitiveness (e.g. Andriotis 2004:131; Tavitiyaman et al. 2011:648), tourism suppliers such as the low-cost airlines (Moreno-Izquierdo et al. 2016:293); tourism stakeholders like volunteer tourism organizations (Benson and Henderson 2011:406) or destinations (Dobrivojevic 2013:361). The model can provide some significant insights on the current and future landscape of the hospitality business, which is being transformed dramatically by the digitalization trend. The Five Forces Model, which was used to examine the competitive structure of e-distribution systems, consists of five structural features that are used to analyze industry competitiveness and attractiveness:

- Rivalry among existing competitors: By taking different forms from price competition to advertising campaigns, the high degree of rivalry significantly affects the firm's profitability depending on its intensity and basis.

- The threat of entry: New entrants can increase the level of competitive pressures in the industry through price cuts, cost reductions, or high investments.

- The power of buyers: Powerful buyers can demand more; low prices, high quality, and better services are among their basic desires.

- The power of suppliers: In a similar vein, powerful suppliers can be a crucial factor that affects the companies' profitability by creating price pressures, limiting quality, or shifting costs.

- The threat of substitutes: Substitute products can be a threat by filling the same need in separate ways. The problem is particularly acute if customers can obtain a better price-performance result by preferring a substitute or can switch the existing product with minimal costs.

## **2. Methodology**

In line with the scope of the study, a qualitative approach was utilized to analyze the competitiveness of the three leading e-distribution systems in the tourism industry. A focus group research involving tourism professional and academics was used to assess direct booking through hotel websites, online travel agencies, and sharing economy platforms as part of the qualitative technique.

## 2.1. Selected E-distribution Systems

**Airbnb:** Airbnb contributes to sharing economy and changes the consumption patterns by creating an online network of accommodation supply provided by regular residents by renting their homes available to travelers. Although the original innovator in peer-to-peer accommodation is Couchsurfing, Airbnb as a commercial intermediary made it possible to spread very fast through the monetary exchange as a substitute to traditional accommodation and it has been a leading player since then. The mass of shared accommodation offerings focuses on major metropolitan areas or popular resorts (Dredge and Gyimóthy 2015:296) where the concept of under-utilization is key to the home-sharing platforms such as Airbnb (Frenken and Schor 2017:124). Airbnb facilitates social interaction between the host and the guest while Heylighen (2017:77) explains the platform as a mediator between both parties by an optimal match of location, time, fee, and reputation.

Since its founding in 2008, Airbnb has gained worldwide acceptance and accessed a strong membership network quickly. As of 2015, Airbnb has more than 60.000.000 members in 34.000 cities and 190 countries with more than 2.000.000 registered facilities. According to the official report of the Airbnb Community Compact on November 11th, 2015 ([www.airbnbcitizen.com](http://www.airbnbcitizen.com)), the recent estimates of the annual economic impact of Airbnb are \$1.960 billion for New York City, \$1.950 billion for London, and \$510 million for Berlin, demonstrating the global economic impact. A UK study on January 28th, 2014 ([www.airbnbcitizen.com](http://www.airbnbcitizen.com)) reported that Airbnb generated \$824 million in economic activity only in 2013 and supported 11,629 jobs. An Airbnb report in 2017 also predicted that Airbnb has the potential to generate \$2 billion in tax revenue for America's Cities ([www.airbnbcitizen.com](http://www.airbnbcitizen.com)).

**Booking.com:** Booking.com is an online booking website and app that attracts visitors from the worldwide leisure and business market. Stangl et al. (2016:91) report that although its dependency and penetration rate varies, Booking.com is considered the world leader in booking accommodations online. More than 6.3 million room nights are booked on Booking.com every week and it offers 879,837 active properties in 224 countries and regions (Booking 2016). Thanks to its international network of accommodation supply, cost-effective commission-based model, and personalized account management service, Booking.com has been very dominant in the e-distribution system of tourism. Established in 1996, Booking.com, as now a part of The Priceline Group, currently acts as both the information distributor and the facilitator that allows travelers to make bookings at a fraction of the time and cost (O'Connor and Frew 2002). Specifically, independent accommodation suppliers are increasingly dependent on specific platforms, with hotels reporting selling up to 80% of their room capacity through Booking.com (Gössling and Lane 2015:1398).

**Direct Booking (Hotels' Web Sites):** Thanks to the internet, hospitality suppliers now understand how to deliver information and sell their services to customers directly through their websites (Law et al. 2004:102). However, traditional and electronic intermediaries cannot be neglected by hotels considering the accessibility problems of their websites and their desire to be or remain internationally recognizable. The findings of Qi et al. (2013:82) reveal that for most online browsers, hotel websites are the most popular information search channel, especially for younger browsers. However, e-distributors websites are easier to understand and navigate when compared to hotel websites (Morosan and Jeong 2008:290). On the other hand, some hotel websites that do not belong to a chain usually neglect to invest in IT and deal with online reservations through messaging/e-mailing systems. Therefore, they capture and fill the demand of society only in a limited way.

## 2.2. Research Design

This study uses a focus group as a primary research method to collect qualitative data to explore the competitive analysis of e-distribution systems in the hospitality industry based on Porter's Five Forces Model. Despite the considerable time and energy, it requires throughout the

process, focus group methodology is assessed as adequate based on the nature of this research. Focus groups are primarily preferred to conduct phenomenological research on people's views, experiences, meanings, and understandings (Wilkinson 1998:185). According to Thomas (2004:200), focus groups are especially efficient in capturing complexities within a specific topic and examining how participants value and express significant notions in their views.

Dean (1994:339) defines a focus group as '*an informal, small-group discussion designed to obtain in-depth qualitative information*'. According to Morgan (1988:12) "*The hallmark of focus groups is the explicit use of group interaction to produce data and insights that would be less accessible without the interaction found in a group*". Yet, focus group methodology is with its advantages such as enabling participants to interact and further encouraging knowledge production through a collective process (Thomas 2004:201). Thereby, a focus group consists of a participants' discussion aiming to collect diverse views on a single topic. Krueger (1998) proposes that 6 to 8 people per group is ideal for participants to share their feedback and expertise and ensure that an original discussion is made. In focus groups, participants are specifically invited to take part in the discussion (Dean 1994:339), and Morgan (1988:34) suggests that groups should be homogeneous and made up of strangers.

### **2.3. Sample Selection and Data Collection**

Great care was taken in picking participants for the focus group that involved scholars in the tourism field as well as businesspeople associated with tourism. In this regard, a focus group was conducted with 6 participants that included two female and four male participants, with 29-52 years of the age range (three scholars and three travel consultants). Qualifications of those selected to participate in the focus group are based on both scholarly and practical tourism experience and expertise in various fields of tourism.

As Stewart and Shamdasani (2014:17) imply, data collection occurs in and is facilitated by a group context in focus group research. Hence, to make sure of the reliability of the data collection process, the focus group methodology was conducted by following the pre-specified phases through a Focus Group Protocol adapted from Harrell and Bradley (2009:223). After introducing the aim of the study and a detailed explanation of the process, initial open-ended questions were raised to open the discussion of the topic. During the meeting, the researchers as moderators inquired the participants about their opinions on the relevant topic. As Gomm (2004:228) noted, the moderator focuses group discussion on a set of topics, rather than simply inquiring. The two researchers created a semi-structured focus group question list to serve as a foundation for discussion. Therefore, participants were expected to discuss the topic in detail through those questions and the moderator encouraged all the participants to talk and probed for further information. The moderator ensured that the discussion among the participants ran smoothly through a coordinated group process, and presented pertinent issues for the group to respond. Moderator also provided direction to make sure that focus on the discussed topic was maintained. Issues such as the demand structure of the systems, the benefits and challenges they each offer for tourists, and how those systems work were among the themes discussed with the focus group. With the prior permission of participants, the focus group lasted approximately 2 hours, was tape-recorded and the researchers took notes of the discussion. After then, the transcribed recordings and notes were cross-checked accordingly. Finally, the researchers' analysis was exploratory and discourse analysis of focus group data was employed.

### **3. Findings**

The study firstly identified the major actors among the e-distribution platforms and chose the cases, which could best represent these systems. Although some studies guide how to use this model in a specific industry (e.g. Dobbs 2014:32) or provide a new set of variables for ecosystems (Kumar et al. 2015:474), the current study focuses on Porter's original model and is based on this discussion, each system is analyzed depending on how they function in the supply-demand interaction. Sufficient information was collected through semi-structured

questions to delineate differences between the three booking models using the Five Forces Model as discussed in the following sub-sections.

### 3.1. Rivalry among Existing Competitors

The benefits and challenges that those three e-distribution systems provide to the hospitality industry, as well as how they individually work, were among the open-ended semi-structured questions meant to explain 'rivalry among existing rivals'. The analysis and interpretation of the collected data reveal that, Airbnb's distinctive practice and success lie in transforming the idea of sharing into a commercial peer-to-peer business by realizing the change and tendency of change in the environment. This has triggered Booking.com to imitate Airbnb offerings and compete with it on a different platform as not only a substitute but also a rival. Booking.com with its user-friendly professional portal requires fewer search costs than Airbnb with its website, as it is already a well-known e-intermediary in tourism. In addition, Booking.com expands its market through contracts with travel agencies that also make the rental apartments accessible to traditional intermediaries (P4and6). Therefore, the essence of success depends on careful evaluation of the market and response to it with original ideas of differentiation and positioning strategies. Porter (1991:106) stresses that "*The most successful firms are notable in employing imagination to define a new position or find new value in whatever starting position they have*". Learning from the changes in the environment inspires companies to evolve and adapt their operations and strategies accordingly. P2 stated, "If you are looking for some fun and excitement in your daily routine, Airbnb is the best option – it is much beyond a sterile room in a hotel in the city center". Furthermore, P4 exemplified how Airbnb is innovative in its products by stating: "Airbnb provides not only rooms/flats/houses, but also adds a unique experience sharing option that is designed by the experts: Let's assume that when you want to learn how to cook gluten-free meals in Paris, attend the activities of a social enterprise working on disadvantaged groups in London, or experience İstanbul with a professional photographer, from now on, you can do it by this option of Airbnb".

As P1 and P4 emphasized, competing on price is not a logical move but differentiation through service attributes is the key to success in the international tourism arena. Therefore, being a pioneer with a distinctive innovation assures the company's success for a certain period until other companies enter the market with a similar or better service product. Hence, to limit the threat of rivals, companies try to offer better value through innovation with continuous research and development, which the initial steps, understanding the structure of the competition and then coping with it based on underlying advantages. Thus, a hospitality or travel business is not apart from its environment that is subject to continuous but often uncontrollable and unpredictable change. For instance, P4 illustrated a different perspective focusing on employees as stakeholders who are under the influence of the change in this sector: "*Anyhow, tourism faculty graduates are replaced with computer engineers since e-distribution tends to spread and increase consistently*". According to Porter (1991:114), companies may fail because of rigidities in the management that blocks improvement and change once the environment provides pressure to advance.

Hence, as a recent phenomenon, the substantial tendency of people toward sharing has created a new tourism business. Most likely, Booking.com as the greatest actor in the tourism e-distribution system was not able to see Airbnb and its emergence coming, disrupting the whole tourism industry and threatening its business. However, as soon as they sensed the threat of Airbnb and the opportunity that it has developed for rental apartments and flats, they responded to it. On the other hand, with the emergence of e-intermediaries, the reservation websites of hotels were threatened which has started with the threatening of travel agencies by the rise of the internet. P1 also declared, "*In the past, they were the only way of finding a good place to stay, but now, we – as customers – don't need the travel agents anymore*". As P3 claimed, the reason why the companies should be flexible is the need to enhance or transform their strategies in case of a new opportunity or threat in the environment.

The intensity of rivalry among existing competitors particularly in service organizations is high since the product is perishable. Product attributes, service or image differentiation, and service quality enhancements that improve customer value are ways to cope with high competition. Priceline's Booking.com and Villas.com are some of the competitors of Airbnb in addition to Expedia's Home Away Network and so forth. As P5 highlighted, in the very beginning, the Booking.com portal was promoting and selling only city hotels, which has changed over time. Today, Booking.com provides not only rooms in traditional hotels but also apartments and homestay lodging through its platform 2013. According to Priceline (2016), Booking.com offers approximately 390,000 vacation rental properties that generally consist of single-unit and multi-unit villas, apartments, apart-hotels, and chalets and are generally self-catered directly bookable properties.

In addition, Villas.com is a designated platform of Booking.com that offers holiday rentals. Hence, the owner of the apartments displays their offerings on multiple platforms like Airbnb or Booking.com while generating more business. On the other hand, Airbnb as the peer-to-peer accommodation leader benefits from high commissions and profits that lead to better financial performance while Booking.com is diversifying its supplier portfolio with many types of accommodation with a lot more facilities. Airbnb continues to sustain its unique competitive position among its counterparts regarding the structure of the non-professional business innovation it has created. For some participants, Airbnb is particularly unrivaled when customers want to pursue their habits and preferences during their travels; at this point, P2 stated that "since I like to have my national breakfast, I can bring my breakfast kit and I am not obliged to have the standard hotel breakfast anymore".

### **3.2. Threat of Entry**

Among the open-ended semi-structured questions aimed to explain 'threat of entry' were the diverse entry constraints for a new intermediary to the e-distribution system. The findings support that the illegality of Airbnb rentals in many countries and the growing debate on its legislation conclusively pose a threat to Airbnb's long-term growth (Guttentag, 2015:1204) and a constraint to new entrants in the tourism market. Governmental regulations have a significant effect on how companies do business. Thus, as all the participants agreed, Airbnb is facing many legislative problems in countries where the sharing system is not based on certain rules and regulations. Although Airbnb's business model now operates with minimal governing controls in most locations, it has extensive efforts towards policymakers to create a fair base for individuals who benefit from home sharing in each country or state around the globe. As Airbnb is at the frontier of sharing economy and is transforming the traditional accommodation sector (Cheng, 2016:68) and despite the legislative prohibition on sharing flats or homes, there are many entrants to the market such as HomeAway and VRBO. However, FlipKey and Wimdu have agreed to join forces to compete with Airbnb more effectively (P5).

Legislation is not the only constraint to the entry of rivals, but inconvenience and safety problems are also major threats. In the case of home-sharing services that consist of intangibility, the reputation of the platform is of utmost importance as it refers to safety, experience, and professionalism. For instance, P3 indicated that no tourist would be pleased if the place they have reserved does not exist or is not the same as the one they thought is. Therefore, the acceptance of new home-sharing platforms is likely to be rather slow, as people tend to buy or sell through secure platforms to eliminate negative issues that are likely to arise for the hosts or guests.

According to Lambertson and Rose (2012:111), the costs of sharing are three-fold: monetary costs as the price of a shared product that includes a one-time system membership fee or periodic access fees; technical costs associated with coping with and learning how to use unfamiliar products; search costs are created through the money or effort they spend. Nevertheless, Airbnb's competitive advantage is being the leader in the market and building a

favorable system that includes millions of properties and users all around the globe. In such a situation, a new entrant would require more time and a bigger investment to build a worldwide reputation. New entrants to the e-distribution of tourism, bring new challenges to the existing ones by creating a competitive environment by putting pressure on prices and costs. When a new entrant is a company that is already existing but diversifying its products to have a greater share it is more likely to be successful on the contrary to brand new entrants. According to P4 and P5, like in the case of Booking.com, adding apartments to its portfolio brought greater chances to succeed since it is already a well-known and well-functioning system, in addition, the starting costs are less, and the existing network supports the new product.

### **3.3. The Power of Buyers**

The power of buyers was measured utilizing questions concerning each system's target segments, user-generated content, as well as its effects on e-distribution platforms. As reinforced by the focus group data analysis, the main customer group of re-distributors is individual foreign leisure travelers whereas business travelers are not regarded as a target customer group because they are more loyal to chains or specific hotels, or bonus programs (Gössling and Lane, 2015:1392). On the other hand, as P1 underlined websites of hotels, whether chain or independent, are mostly preferred by business travelers. Although it seems that these e-distribution systems try to reach different customer segments, the increasing competition forces companies to reach other segments as well. Therefore, being a customer-oriented company has been a critical aspect of running a business in this sector and all companies want to ensure customer satisfaction.

One way of achieving a prominent level of customer satisfaction is to provide the most accurate and reliable information about the accommodation alternatives. Here, both Booking.com and Airbnb establish a peer-evaluation system that enables prospective customers to reach the experiences of former customers. Booking.com encourages and almost forces travelers to judge, explicitly supporting critical perspectives, as guests are asked to report both positive and negative experiences (Gössling and Lane 2015:1389). Nevertheless, Airbnb has a system that is almost solely dependent on the comments that are provided by and for supply providers and users. On the other hand, P1 emphasized the lack of adequate monitoring and controlling mechanisms on such systems: “sometimes seeing photos or reading customer feedback from Airbnb is not sufficient to portray the actual situation of a room; moreover, the room-owners do not update the current changes in and around their places – like an out-of-order lift or a noisy road work, etc.” Although the rating system’s purpose is to minimize the risks involved in sharing system, according to Guttentag (2015) Airbnb will always have somewhat limited appeal because of security concerns and unpredictable experience of quality. Since hotels are both the provider of facilities and their reservation systems, their online systems do not usually involve such a place to leave feedback.

Since those feedback systems are built around the customers’ opinions and open to all interested parties, the bargaining power of customers on the facility itself is quite high; if customers are continuously complaining about the noisy air-conditioner of a facility, the manager or homeowner must deal with the problem to stop those negative feedbacks. However, those feedbacks are solely about the facility and its features - not the role of re-distributors as the conveyor of the relationship between buyer and seller. It is clear that the new type of tourist is very demanding, aware of their needs and wants, and access to information yet knowledgeable about the major developments in communication technology. For instance, P5 stated, “I can easily reserve a room even when I’m driving to Çeşme (a holiday destination near Izmir/Turkey) by using my smartphone; I can look at the room’s photos or compare prices within seconds – it’s just that easy”. Moreover, they are more conscious and less loyal and they search for the best deal they could obtain (P1,3and4). Powerful buyers may force the e-distributors in the hospitality industry to have a greater value through decreased prices and enhanced quality that does not include individual buyers but only corporates or traditional travel



agencies which could generate a high volume of demand. P2 and P4 also demonstrated that, for such platforms, buyers do not reveal much power since the buyers are only individuals or corporates for Airbnb while the buyers for Booking.com may be traditional mediums as well. Porter (2008:16) defines them as “*intermediate customers, or customers who purchase the product but are not the end-users gain significant bargaining power when they can influence the purchasing decisions of customers downstream*”. Keeping that in mind, both Booking.com and Airbnb have a separate platform for corporate companies and businesses, to which the executives can subscribe with their company name and e-mail address (P6).

### **3.4. The Power of Suppliers**

The power of suppliers in the hotel business was investigated using questions regarding service providers and their relationship with e-distribution systems. For instance, accommodation sharing was the sharing economy form primarily driven by economic considerations, according to the findings of the focus group study and similarly concluded in Böcker and Meelen's (2016:37) study. In this sense, if the economic benefits are attained for both parties, the system will be nourished. Despite Airbnb's substantial disrupting impact on tourism, there are still some conflicts arising from the system that it has built. The benefits of Airbnb are economic prices, the feeling of being in a home over a hotel, access to practical amenities, and the provision of useful local advice by hosts (Guttentag 2015:1196). On the other hand, despite Airbnb's projected growth, it is still facing regulatory difficulties in many of its markets around the world (Kokalitcheva 2015). Regardless of its economic benefits, Gössling (2016:1034) highlights the potential downside of reducing local people's access to housing, and potentially unregistered properties avoiding tax payments. However, home-sharing has helped thousands of middle-class hosts and turned the cost of housing into a way to generate a bit of extra money Airbnb (2015) and it still does so. In addition, Guttentag (2015:1200) questions these conflicts surrounding Airbnb as are relevant to all major tourism stakeholders, including tourists, residents, tourism bureaus, hotels, and governments.

In addition, e-distribution of accommodation depends solely on the hospitality sector as a supplier. According to P3, “the competition drive out such systems used by hotels and they should accept that the ugly truth: most of them are just the suppliers of e-intermediaries anymore”. For instance, according to P1, as the international chains can afford highly digital and individual websites providing online reservations and offering promotional incentives to online customers, suppliers have more power to bargain down commissions paid to Booking.com. On the other hand, small hotels or home-sharing do not allow such an investment in online technology, which makes them more vulnerable to these online platforms (P1,2and3). In the case of Airbnb, the power of suppliers become limited when Airbnb controls and manages the system with its powerful influence on the overall tourism system and lobbying on a governmental basis. Suppliers of Airbnb, that are regular people having a spare bed or room with an individual property are not likely to have such power.

### **3.5. The Threat of Substitutes**

The moderators' open-ended inquiries about the three e-distribution systems' substitutes led the participants to a discussion about the thin line between Airbnb as a substitute and a competitor with other systems. Substitute of Airbnb offerings is e-distribution platforms such as Booking.com that sell rooms of traditional hotels as well as apartments and flats; non-commercialized home-sharing systems such as Couchsurfing and corporate websites of hotels that perform a similar function. Lately, Airbnb that created a shift from hotels to apartments threatens Booking.com, whereas Airbnb may consider Booking.com, not as a threat but rather as a barrier to its growth and a limit to its potential profitability. Hotels provide professional hospitality services on the contrary to residents who share their houses/flats/rooms. P5 stated that Hilton's e-distribution system could not beat online reservation systems: “Except its loyal customer, many customers like to see all possible alternatives and compare them when making a

buying decision. Hilton must focus on increasing customer loyalty.” Thus, Airbnb has changed the structure of the industry by opening up new ways to serve existing accommodation needs for tourists as a disruptive innovator. According to P1 Airbnb, for instance, may “fill the gap between the demand and supply in some occasions such an existence of an event in the city where it is not easy to find an available room at hotels or find an economical one”.

For instance, Airbnb is booming in Iceland since there are not enough hotels to cope with and they help to fill this gap (Comiteau 2016). Thereby, the existence of home-sharing in addition to professionally operated hotels has resulted in the expansion of the tourism market and an increase in tourism density at the destination level. To limit the threat of substitutes or competitors, companies constantly improve their services with new attributes. However, as all the participants approve, the buyer's cost of switching to the substitute is low in e-distribution systems in tourism. As Porter (2008:273) implies the substitution, a threat can also shift in favor of the industry especially when each competitor aims to serve the needs of different customer segments. Thus, to attain viability and long-term profitability, companies should monitor the external environment factors, competitors and substitutes as well.

### **Conclusion and Implications**

Thanks to IT, the hospitality industry has transformed, and the competitiveness of the actors has been reformed. In a near future, all companies in this sector “should leverage an increased awareness of customer expectations, re-imagined technology strategy, and differentiated offerings to provide unmatched travel experiences” (Deloitte, 2017). Therefore, the emergence and growing impacts of e-business models, which transform the innovation as a form of new idea or application (Zaltman et al., 1973) into the diverse needs of different sectors, affect the quality and quantity of business operations significantly.

Following Nicholls and Murdoch (2012:4), the type of innovation in each system is classified as incremental (meeting the needs by providing a more effective and efficient manner), institutional (meeting the needs by changing the configurations at the institutional level), and disruptive (meeting the needs by changing the existing system radically) depending on the findings of the study. While Ho and Lee’s (2015:130) typology on deepening (developing existing product function), widening (adding complementary functions to the product mix), drifting (changing the usage of product), emerging (providing a completely innovative solution) is used to frame the demand, the supply of each e-distribution systems is also analyzed based on the level of social innovation they generated. Therefore, Airbnb is largely different from the other two e-distribution systems with its ability to enable individuals to rent their rooms directly to others. The company claims that its home-sharing system boosted economic innovation and job creation. In this sense, it fits well with the characteristics of *disruptive* innovation (Bailey 2017); the Tribeca Disruptive Innovation Awards of 2015 were dedicated to Airbnb to honor-related efforts. Airbnb fills the gap in *emerging* market demand by transferring the traditional practice of renting residents’ houses to tourists through a global and online platform. It is different from other e-channels in the distribution system with its high provision of interaction between hosts and guests even letting the host reject a customer that s/he finds unreliable and suspicious and vice versa. The reservation system of Airbnb asks for very detailed information from both parties to assure the provision of accurate information even through photographs, identity cards, or social media accounts such as Facebook. Airbnb also supports the verification of information about the places to rent by enabling a review system. Additionally, by their interchangeably dual roles, suppliers become residents or residents become suppliers easily. It opens the communication channel between the hosts and guests. Therefore, here the system enables its user to exchange their evaluations and examinations on each other freely and enhances the scope of stakeholders by networking them on its system. Additionally, as an online reservation system, it creates an economy and impulses toward social change in the local community.

Hence, Booking.com referring to a transformation of a distribution channel to a globalized construct is simply an example of *institutional* social innovation. The traditional distribution system remains the same with the suppliers, consumers, and intermediaries just with a slight change of travel agencies to online travel agencies that developments in information technologies allow the industry to do so. In the second domain, Booking.com is *widening* the market demand by adding its rating system and customer reviews providing user feedback for other potential customers in the online context. Booking.com is an outstanding source of information, by means of gathering millions of hotel reviews in a quick, cost-effective, and convenient way to assist the customers to find decent accommodation. It fills the global scale demand by these features designed on information technologies. In the last domain, while the former system solely focuses on the interest of customers, here Booking.com acts as an intermediary by bridging and bonding hotels with customers. Therefore, it seems that Booking.com must recognize and position the power, legitimacy, and urgency of two major stakeholders' interests at the heart of its system, and again other stakeholders can surround these two stakeholders, which can be located at the outer layers. Despite its overall implications on stakeholders increasing, it reaches a limited range of societal groups.

When hotel websites are assessed on their social innovation point, it can be regarded as *incremental* social innovation based on the shift from traditional reservations through telephone, e-mail, or any intermediary such as travel agencies or tour operators to direct online reservations. In terms of its market demand, hotel websites attract a demand at a *deepening* level as these websites mostly aim to attract loyal customers by enabling them to make a quick and convenient reservations. The use of technology here is to make an existing system more efficient and quick than the traditional booking system, but it does not try to fill a larger demand gap of people. Since these websites are called by the hotels' brand name, their accessibility is questionable in the search engines. It is also debatable whether hotel websites offer better prices than any other e-intermediaries or not. On the last domain, hotel websites that enable direct booking by eliminating any intermediary involve mainly one single stakeholder by considering its power, legitimacy, and urgency as *customers*. The implication of the system over other stakeholders surrounding customers such as local businesses, residents, and the government is rather difficult to determine. Regardless of their distribution strategy, hotels need to advance their technology use and continue to improve their websites (Lee et al. 2013:105). Toh et al. (2011:181) suggest some ways to strengthen sales on hotels' websites such as maintaining a best-rate guarantee, retaining premium rooms for sale, and offering discounts or other promotions. In addition, Paraskevas et al. (2011:200) also recommend optimizing web pages to attract potential customers to their websites as most hospitality businesses rely heavily on search engines and meta-search engines.

Table 1 provides a comparative evaluation of the discussion on the key elements of competitiveness for the selected e-distribution systems based on Porter's model, Crouch and Ritchie (1999:141) as well as supply and demand.

Table 1. Elements of industry analysis

Elements	Sub-elements	Airbnb	Booking.com	Hotel's Web Sites
Five Forces	Rivalry among existing competitors	High	High	High
	Threat of entry	Low	High	High
	The power of buyers	High	High	Low
	The power of suppliers	High	Low	None*
	The threat of substitutes	High	High	High
Territory	Target Market	Mostly leisure travelers	Both leisure and business travelers	Mostly business travelers
Stakes	Market Share	Increasing	Increasing	Decreasing
	Profitable	Increasing	Increasing	Decreasing
	Survival	Long-term	Long-term	Short-term
Tools**	Corporate strategy	Differentiation	Cost-leadership	Focus
	Market Share	Increasing	Increasing	Decreasing
Demand		Emerging	Widening	Deepening
Supply		Disruptive	Institutional	Incremental

\*Providers of rooms and website are the same.

\*\*Since the market research and competitor analysis are based on company-specific tools, they are not involved in the evaluation.

The five forces model analyzed in this study can figure out the competition at the company/product level in the tourism sector by taking the target markets as the territory, treating the market share, profitability, and survival as the major stakes, and using the goods and services, corporate strategy, market research, and competitor analysis as the tools (Crouch and Ritchie, 1999:141). In this regard, direct or indirect e-distribution systems' competitiveness is based on these elements of competition and can be improved through specified tools. Here, Airbnb with its disruptive innovation of non-professional accommodation facilities and Booking.com with equivalent products should be evaluated apart from direct or indirect hotel booking systems. Although Airbnb boasts an emerging market demand, it also targets the hospitality sector by expanding it in terms of supply and demand. In addition, Porter (2008:26) stresses the mergers and acquisitions that alter the competitiveness in the industry. This brings a question to mind if Airbnb and Booking.com may ever merge and dominate the whole accommodation industry.

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