

UPSCALE AND LUXURY HOTELS IN ROMANIA FACING DIGITAL ADVOCACY: SUCCESS OR FAILURE?

MARIA-LUMINIȚA COJOCEA¹, MONICA-MARIA COROȘ²

ABSTRACT. Digital marketing is rapidly changing the current state of the hospitality industry, starting from how services and information are provided, communication and interaction with the customer is done, to the incentives that persuade customers to purchase. These challenges could not have been foreseen at the beginning of the Millennium. Not only the concept 'digital marketing' became commonplace but businesses that implemented digital strategies have become highly sought after by customers and praised by the media. This paper aims at analyzing the digital means and information tools used by 4 and 5-star hotels in Romania to promote themselves online, as they are supposed to have the financial funds to be early adopters of technology, how the customers actually see these hospitality businesses and the hotels' online presence and activity impact on their prevailed rates.

Keywords: Millennials, Hospitality, Technology, Communication, Social Media, Digital Marketing, Online Presence, Demand Management Strategy, IT&C Readiness, Tourism Competitiveness, International Affiliation, International Hotel Chains/Groups, Independent Hotels.

JEL Classification: L83, Q01, Z32.

Recommended citation: Cojoccea, M-L., Coros, M.M., Upscale and Luxury Hotels in Romania Facing Digital Advocacy: Success or Failure?, *Studia UBB Negotia*, vol. 63, issue 2 (June), 2018, pp. 23-52, doi:10.24193/subbnegotia.2018.2.02.

¹ *Data Analyst, UK, luminita.cojoccea@hotmail.com.*

² *Lecturer, PhD, Department of Hospitality Services, Faculty of Business, Babeș-Bolyai University of Cluj-Napoca, monica.coros@gmail.com.*

1. Introduction and Literature Review

Many studies cover the Romanian tourism and hospitality industry. Still, insignificantly few academic and/or professional researches targeted demand management strategies with impact upon the hotels' online performance. Therefore, this paper aims at presenting the big picture of Romania's tourism attractiveness and competitiveness in the online environment, by analyzing the online performance of 4 and 5-star hotels, their Social Media presence (SM), correlated with their prevailed rates and their alignment with the Millennials' trends and preferences.

As of 1990 hotels accounted for 60.63% of Romania's accommodation capacity, reaching by 2000 25.99% in terms of establishments and 66.88% in functioning capacity, of which, 4* and 5* hotels represented together 2.1% in terms of lodgings and below 5% of the available functioning beds, reaching 29.97% in 2014 and 33.04% in 2016. Over the past seven years, 5* hotels have stayed constant, reaching nearly 5.5% in 2016, whereas 4* hotels have increased significantly. Currently, hotels ranking 3* are the most numerous and provide most beds (National Institute of Statistics, 2017).

The overall quota of international tourist arrivals in Romania is still very low, having risen from 11.6% in 1990 to 22.5 in 2016. The percentages are somewhat higher for hotels, increasing from around 15% in the mid-1990s to 27.2% in 2016. Hotels continue to concentrate most of Romania's tourist arrivals (80.4% in 1990 and 72.1% in 2016), attracting most of the international arrivals (93.1% in 1990 and 87.2% in 2016). Foreign tourists seem to have been the dominant segment of the Romanian 4 and 5-star hotels, accounting together for 78.6% of all arrivals in 1997, nowadays being a significant segment, with 43.5% in 2016. Foreigners represented the vast majority of upscale and luxury hotel clients in the mid-1990s (95.5% for 5* and 78.3% in 4* hotels); quotas remain very high for 5* hotels (68% in 2016), respectively high for 4* hotels (38.1% in 2016); at the same time, Romanian tourists seem to prefer mid-scale hotels, having shifted from 1* and 2* (67,4% in 1994 and 20.1% in 2016) to 3* (13.2% in 1994 and 45% in 2016). (National Institute of Statistics, 2017).

Starting with 2010, the Romanian economy has had the largest nominal average annual GDP growth rate at European level (12.5%) but

the percentage has slowed-down due to high inflation rates; moreover hotels are the second largest sub-sector as turnover, accounting for 31% in the 2010 total (Ernst & Young, 2013).

In Romania, 46% of interviewed companies say their marketing team has a strategy for social networks, 19% have integrated this strategy into all the company's departments and 7% have it implemented only by the commercial team but 27% admit their company does not yet have a strategy on social networks. The same survey reveals that: 40% of the customers are already digital consumers, compared to 60% at global level; furthermore, 87% of the respondents possess smartphones and 58% tablets; consumers take purchase decisions only after verifying the information in multiple sources, furthermore, the price has the biggest influence on the online purchase decision (Badea, 2016).

Romania performs poorly regarding IT&C Readiness, ranking 59th of 141 countries in 2015 and 60th of 136 states in 2017 (World Economic Forum, 2015; 2017); in fact, current technologies are used at a low level, international tourism revenues are also low, Romania facing numerous challenges, thus it needs to invest and develop the IT&C sector in order to attract more foreign tourists from other areas, besides those from neighboring countries.

According to the European Travel Commission, Romania and the Czech Republic both rank 5th in top-five destinations investing in their tourism potential; Romania also ranks 3rd for US visitor-volume growth (Skift, 2015a). Moreover, Romania ranks 1st globally for the percentage of hotels offering customers free Wi-Fi, while only two other European countries, Poland and Slovakia, are also present in top ten (Deloitte, 2015c). Further, Romania ranks 5th worldwide for Wi-Fi quality; only three other European countries Sweden, Norway and Hungary appear in top 10 (Minardi, 2015). Consequently, if hospitality businesses continue or begin to capitalize on the digital marketing opportunities provided by today's technological infrastructure, there are signs that improvements can be expected on the long-run for both businesses and customers.

The purpose of this paper is to reveal the current tools and channels used by 4 and 5-star Romanian hotels in the online environment, regarding how they connect with their users and the challenging path they must follow to improve their online presence and to strengthen their capabilities for long-term competitiveness.

Numerous hotels have developed websites, using them as the main tool in promoting their products and services, aiming at attracting customers and also at providing them the opportunity to book rooms directly, via the website, without needing to contact intermediaries, like travel agents or specialized tourism platforms. Thus, hotels avoid paying fees to third-parties, selling, instead, directly to customers (Rus & Negrușă, 2014).

The continuous fast-track development of digital technologies and their natural adoption by users disrupts the linear paths and purchasing reasons exploited by hospitality businesses until now, as “nine in ten holidaymakers carried out online research before booking their last holiday” (Deloitte, 2015a). Hospitality businesses have been quite slow in adopting technology and adapting to the constantly changing consumer habits, while consumers seem to have gained more power related to tourist destination choice given the availability of information online. Consequently, “travel has evolved from a seller’s to a buyer’s market” (Deloitte, 2015a). Moreover, the purchase is strongly influenced by their constant search for the best deals, thus, the travel businesses’ self-praise, assuming that they are the perfect option or that their prices are fair, is worthless and damaging for them, as information and the very many options to choose from are easily available online.

Further, after the completion of purchase and the experiencing of services, “consumers move from just using content to actually creating it by writing reviews” (Deloitte, 2015a), consequently their power and influence continue to increase, consumers becoming more influential than ever, while travel businesses face the risk of losing control of their reputation (Deloitte, 2015a). Building on the same idea, the (Skift-Boxever, 2015) report reveals the existence of “an aspect of authenticity in social proof that a direct-from-brand message just can’t accomplish”, proving that people are more likely to book a certain destination knowing that their friends/relatives or a significant number of people have recommended or liked it. Notorious travel brands have understood this from an early stage: *TripAdvisor* shows first the reviews of friends or of the *Facebook* friends’ friends, and only afterwards it shows other reviews, too. *Booking.com*, on the other hand, with its friendly language and in-depth analyzed psychological methods, pushes the potential customer to book urgently by highlighting the number of people

simultaneously looking at the same property, the number of recent bookings, and the fragile scarcity of the still available rooms.

Discussing about the implications of the latest technology only makes sense if Millennials are brought into attention. Euromonitor International (2015) specialists define Millennials as the consumers ageing 25-34 years, who “represent a sizable demographic, ranging from 11% of the population in ageing Japan, to 18% in more youthful markets, such as Vietnam and South Africa, to 31% in extreme cases such as the UAE, where there is a large group of workforce age expats present”. Travelling is very important for Millennials, who are estimated to account for approximately 20% of all international travelers and are expected to increase their number of trips by almost 50% between 2015 and 2020. They are strong users of technology and social media and seek to make real connections, authentic experience, and value for money (Euromonitor International, 2015). Nowadays hoteliers face a serious challenge, that of understanding how their clients relate to technological innovations and to which extent, respectively during which stages of their hotel experience, they are still eager to interact directly with the personnel. Only after they envision the customer experience they want to provide, can travel companies explore the technological options that best support the achievement of their goals (Deloitte, 2017).

2. Research Methodology and Sample

The current paper is designed as a case study, which aims at discussing the online presence of Romania’s upscale and luxury hotels. A sample of 353 hotels (317 hotels ranking 4-stars and 36 units of 5-stars) officially active on Romania’s market, in 109 localities throughout various tourist destinations, in 2015 (Autoritatea Națională pentru Turism/Ministerul Turismului, 2015) were analyzed from the perspective of their online presence. The analyses focused on the online performance of the hotels’ websites relying on *Quality Criteria for Website Excellence* factors (World Best Enterprises, n.a.), completed with contemporary key-elements (mobile-friendliness, location, loyalty programs, reviews, awards, booking accessibility, and Social Media (SM) connections). A scoring system of 20 elements was developed (10

covering website-based advertising and 10 dedicated to advertising through other means). Each met criterion was granted 1 point. This scoring system enabled the results' analyses: by tourist destinations, the online performance and a correlation between the scorecards, average rates, review scores with the local and international awards received by the hotels. Several aspects were considered for each hotel: independent or nationally/internationally affiliated; overall website aspect (multi-lingual, features such as: website responsiveness, location services/map/*Google Maps* widget implementation, contact form, loyalty programs, customer testimonials, reviews/scores from *TripAdvisor/Booking*, and local/international awards). Special attention was granted to establishing whether the booking option is easily accessible and its connection with the websites' external online environment. Analyses of the external environment elements of the websites and their presence on SM, the existence/absence of apps and the possibility to check-in online, *Facebook* promotion and reservations/sale, the presence on *Booking.com*, *TripAdvisor*, and on Romanian tourism platforms (*Infoturism.ro*, *Travelro.ro*, *Plaja.ro*, *Viaromania.eu*, etc.). The ranking in Google results was also considered. The use of *Google AdWords* for the hotels' promotion was studied. *Booking.com* scores were also considered. Furthermore the results of the analyses (scorecards) and the *Booking.com* scores were correlated with the hotels' online performance and the prevailed rates in order to highlight the impact of meeting more criteria.

3. Results & Discussions: Issues, Controversies, and Problems

Surprisingly, as Figure 1 reveals, the websites of 11% of the 5* hotels and of 6% of the 4* hotels are available only in Romanian, whereas only less than a half of the 4* hotel websites are available in both Romanian and English. More than a quarter of the 4 and 5* hotel websites are translated into more than two languages. A number of 27 websites belonging to internationally affiliated hotels, operated under brands such as *DoubleTree by Hilton*, *Radisson Blu*, *Best Western*, and *InterContinental*, are available only in English.

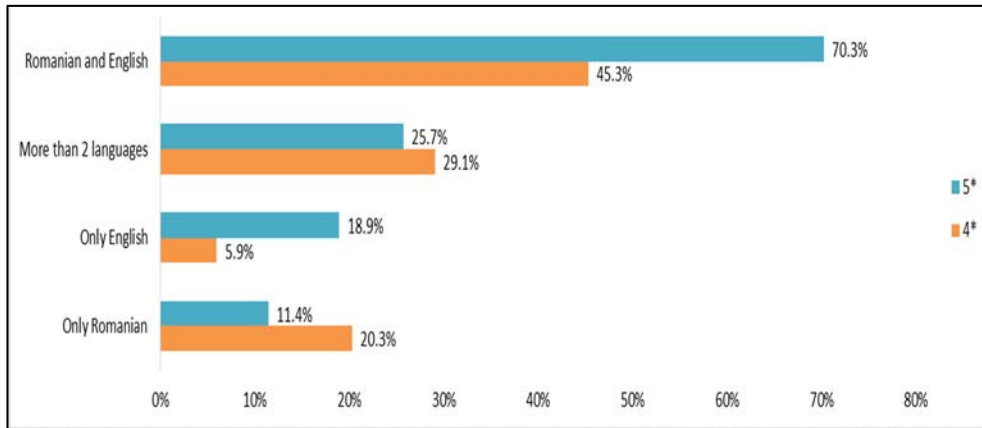


Figure 1. Foreign language usage on the websites of 4 and 5* hotels (general view)

Source: Authors' processing

Figure 2 presents the languages used most frequently by hotel websites, namely Romanian and English, followed by German, Italian, French, and Spanish; all other identified languages appear under the "other languages" category. *Google Translate* (present on some websites) was not considered an acceptable option for multilingual communication, as automated translation cannot ensure an accurate quality.

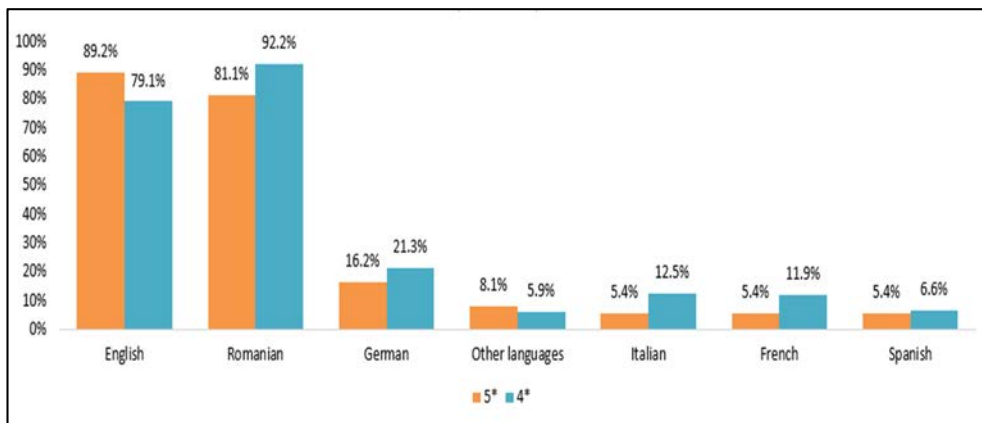


Figure 2. The presence of foreign languages on the websites of 4 and 5* hotels (detailed)

Source: Authors' processing

Another investigated aspect is related to how a website design is perceived, in fact, a really subjective matter. Only 70% of the hotel websites provide a pleasant experience. The analyses concerning the websites' aspect led to the identification of websites with designs that should not be used by 4 or 5* hotels and, in some cases, not even by any hotel, regardless of its classification. Examples include:

- errors and visible lines of programming codes that permanently appear on pages;
- repulsive or obsolete design, which could easily be mistaken as websites of lower hotel categories;
- websites that use high amounts of descriptive text.

Besides the sometimes-disappointing design, a factor that could be an advantage but often results in a disadvantage is the use of templates. A poor experience of a potential customer visiting a hotel website can often generate a negative impact on the decision-making process; thus, the traveler may: book on the website of a competitor that offered a better experience; write a negative SM review; share a story about an incident with family/friends; or even stop using a certain brand.

Frits van Paasschen, President and CEO of *Starwood Hotels and Resorts* points out the importance of mobile booking: "Mobile booking is becoming a fundamental part of how people travel. Mobile is growing multiples faster than the web did for us a decade ago..." (PrivewaterhouseCoopers, 2013).

Hilton Worldwide proves that investing in digital marketing significantly increases returns on investments, as: "Today's travelers have more research and booking options than ever. To search for a hotel, they will typically visit a variety of sites to compare rates, photos, reviews, availability, and other variables. They expect this information at their fingertips to help guide decision making and let them immediately book the hotel once their mind is made up, no matter which device they are using." (Google, 2015). Therefore, hospitality businesses need to constantly connect with customers through various mobile devices. In Romania, this represents a limitation, as less than half of the upscale and luxury hotels meet this demand.

Nowadays customers expect to have the possibility to use their mobile devices in hotels, thus, free Wi-Fi is actually one of the most sought features when researching hotels to book; in fact, 86% of the travelers expect Wi-Fi to be free of charge (Freeman, 2015). Romanian hotels fail to capitalize on such opportunities, with only 40% of them having mobile-friendly websites and only 8% having implemented mobile apps. A global survey of *TripAdvisor* revealed in 2013 that 87% of the tourists use a smartphone and 44% of them use a tablet while travelling, therefore, hotels reconsider all aspects of the guests' experience from booking to check-out, focusing on facilitating the use of such devices in rooms, meeting spaces, lobbies and front desk areas (Ernst & Young, 2015), and, furthermore, they generate push notifications for mobile devices (smartphones, tablets, smart watches, *Google* glasses) during the customers' stay, to increase reservations of additional services.

Recent and ongoing technological advances have facilitated guests' direct involvement in several hospitality processes, reducing human capital costs on the long run and leaving more time for the employees to develop in other aspects of the business. Thus, "self-service is now doing for the service sector what mass production once did for manufacturing, automating processes and significantly reducing costs. With self-service kiosks in hotels, restaurants, and airports, self-service options are becoming a part of everyday life." (Lema, 2009). Another research (Rafat, 2015b) reveals that 40% of the tourists use two devices and 58% of their budget spending occurs while travelling. Furthermore, almost 60% of the respondents consider the interaction with screens, in addition to but also instead of human interaction, to be increasingly acceptable if justified by clear benefits.

Easily locating a hotel through mobile devices is essential. About 80% of the websites have implemented the *Google Maps* widget, whereas the remaining fifth simply present an image showing the location of the hotel. Moreover, while smartphones/tablets can be easily, and free-of-charge connected to GPS, only half of the websites are mobile-friendly, as Figure 3 reveals.

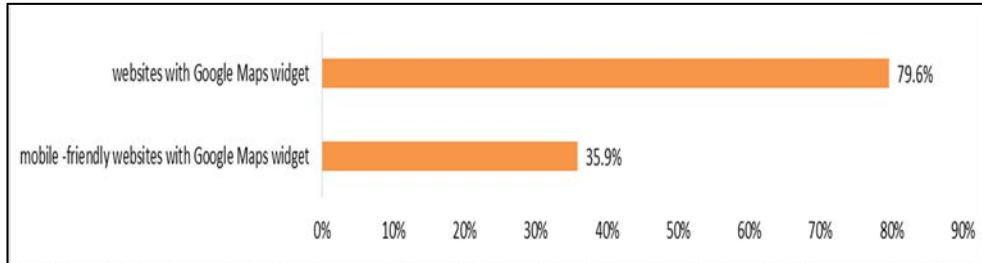


Figure 3. Information regarding hotel location on various mobile devices
Source: Authors' processing

Figure 4 shows that less than half of the hotels in each type of tourist destination have a mobile-friendly website with the *Google Maps* widget implemented.

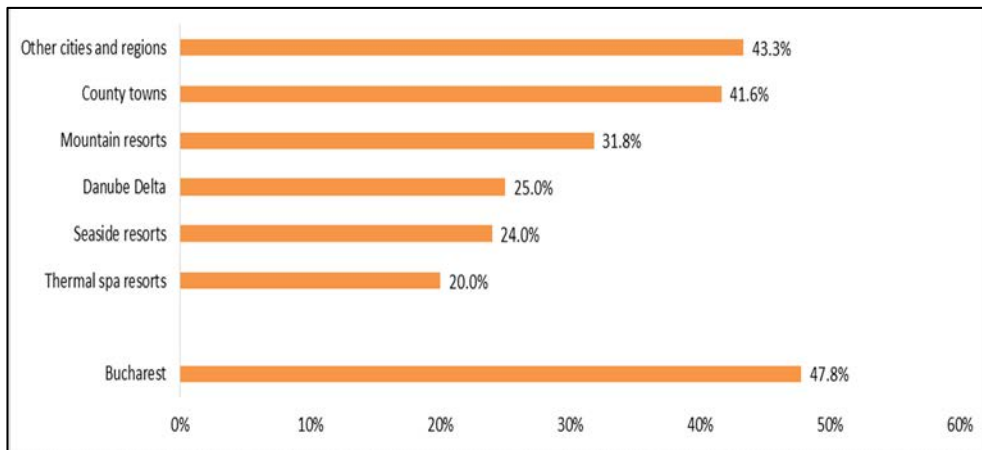


Figure 4. Mobile-friendly websites with Google Maps widget, on tourist destinations
Source: Authors' processing

Direct communication is encouraged by only 55% of the websites, which have an online contact form, while the rest provide only an e-mail address.

Loyalty programs are essential tools enabling hotels to engage customers and to create a better, more personalized experience. Some

hotel loyalty programs are moving away from simple points-based programs to offering specific experiences, unique products and personalized services to members. Comprehending the customer’s goal and how this can be achieved is an important next step. This is where big data steps in, the key being data delivered by digital tools and how information can be used to create genuine personalization at customer level (PrivewaterhouseCoopers, 2013). Only 13% of the Romanian hotels provide loyalty programs, with 77% of these programs belonging, in fact, to renowned international hotel chains. Thus, as data in Figure 5 show, it becomes obvious that Romanian managers do not fully acknowledge or understand the competitive advantage of loyalty programs or do not value their customer(s) enough.

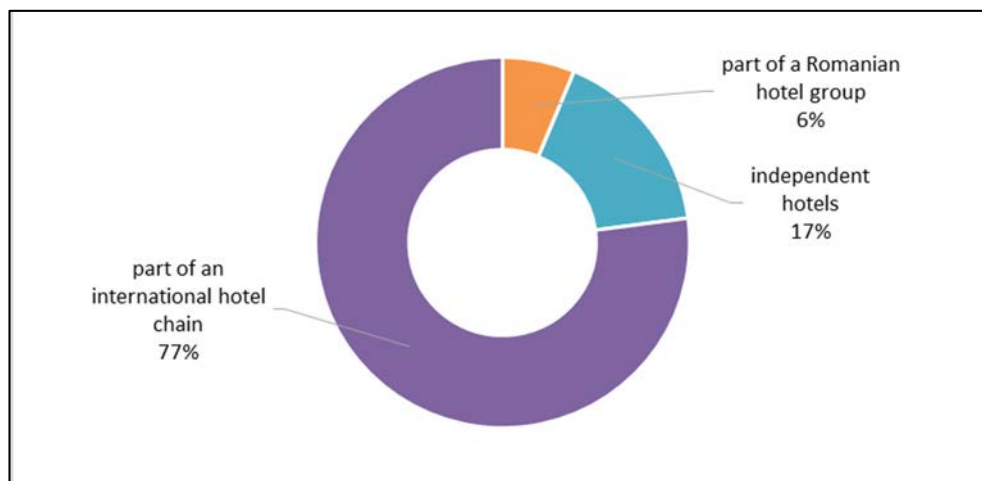


Figure 5. Loyalty programs of 4 and 5* hotels
Source: Authors’ processing

Only one Romanian hotel group (namely, Ana Hotels, with 5 properties in its portfolio) provides a loyalty program. Furthermore, only 8 independent hotels (3 of 5*) implement such programs. *Wyndham Reward Points* is the most popular loyalty program, followed by *Best Western Rewards Points* and *Guest Loyalty Program* from *Group de Louvre*, as Figure 6 reveals.

Most hotels implementing a loyalty program are located in Bucharest and county residences (81%), the remaining 19% functioning in other types of destinations, except for the Danube Delta and the spa resorts where no hotel implements a loyalty program. Bucharest hosts 48% of the hotels that offer loyalty programs to their guests.

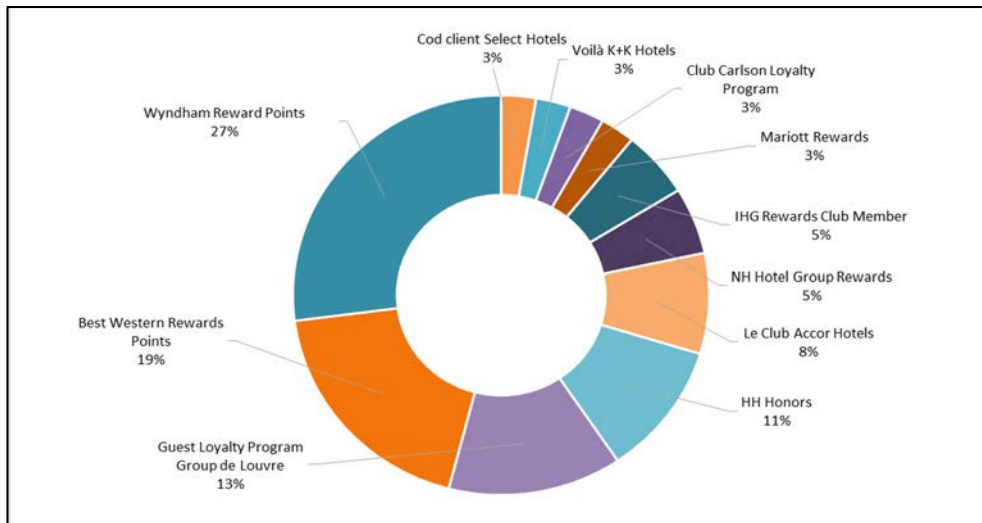


Figure 6. International hotel chain loyalty programs
Source: Authors' processing

A recent survey of UK respondents, a country with a high technology score (World Economic Forum, 2017), shows that 59% of the British holidaymakers compare prices online and consider that review websites have the most influence on their booking decisions. Moreover, their popularity is expected to increase significantly (Deloitte, 2015a).

Hotels ranking 4 and 5* feature superior amenities, facilities and services compared to lower category hotels. Therefore, they enjoy the possibility to set higher rates for both basic and additional services. Consequently, potential customers desire to get more information prior their booking decision concerning expected benefits at the destination and concerning the higher expenses compared to picking a lodging ranked lower.

Customer persuasion means that can be controlled by hotel owners are the look of the website, the pictures and keywords used, the interaction with the customer before arrival, etc. In addition, most tourists, particularly Millennials, are constantly connected with technology, using SM and platforms such as *TripAdvisor* and *Booking.com* before, during, and after the travel. Moreover, online reviews provide a reliable source of information for the consumers and, therefore, they become potentially valuable means of selling. Customers only get involved and are willing to contribute at their maximum potential if their virtual experience is gratifying, enjoyable and engaging; thus, according to Sigala, Christou & Gretzel (2012, pp. 33, 208), 88% of the leisure travelers reported being influenced by online travel reviews and looking up information on virtual travel communities, travel guidebook sites, and travel distribution sites. Hotels can be proactive and encourage clients to contribute with reviews by providing incentives (competitive prices, coupons, rewards for recurring customers, gifts, etc.). In Romania hoteliers could meet tourists' demands on their hotel websites by implementing free widgets linked to social networking sites (*TripAdvisor*, *Booking.com*). This is a preferred solution, as the use of testimonial-sections seems depreciated today, when specialized third-parties (*TripAdvisor*, *Booking.com*) are more trustworthy, increasing transparency and consequently boosting customers' confidence when seeking the best decision. Of the 353 hotels having their own website, only 11% have a testimonial-page and only 4% promote *TripAdvisor* reviews. Furthermore, only 13% of the hotels promote *TripAdvisor* or *Booking.com* scores through a widget on their own website, and only 4% display testimonials or reviews from *TripAdvisor* and the scores obtained on *TripAdvisor* or *Booking.com*.

Better reviews generate higher results for hospitality businesses, terms of booking volumes and also in revenues, having the ability to positively impact prices. Online guest satisfaction (expressed as review score) has a direct impact upon the financial performance of hotels (Anderson, 2012). Together with hotel classification systems, well-designed online guest reviews and user-generated content are essential topics of the hospitality and tourism sectors, providing independent and trustworthy information sources regarding the hotel's standard and services' and facilities' quality, enabling consumer decision-making

processes and the choice of a lodging facility (UNWTO, 2014). Norway and Abu Dhabi have already implemented customer reviews as a criterion in their own classification systems (UNWTO, 2015). Thus, customer expectations (the basis of classification systems) and various perspectives and changes in expectations (reviews) can simultaneously be formally monitored. Moreover, travelers are not expected to make more hotel reservations but rather to be willing to pay more for the hotels with the best reviews. In fact, 72% of a study's respondents picked hotels with higher average review scores, of which 60% chose the hotel with the highest average scores. Thus, hoteliers focusing on online reviews may benefit from increasing revenues and conversion rates, as well as optimizing pricing (Ady & Quadri-Felitti, 2015).

Millennials have already started to contribute to this in many emerging economies, where they are an unusually wealthy generation, who gain more than their parents and grandparents, and who are keen to demonstrate this. Millennials are optimistic concerning their financial future and are very willing to spend on certain areas: gadgets, clothes, health and fitness and life experiences (such as travelling) (Euromonitor International, 2015).

Again, only few hotels (15%) promote their local and international awards. Among them, 12 hotels are of 5* and 13 are internationally affiliated. Also, a small percentage of the hotels having received an award/prize promote at least one key element on their websites: testimonials, *TripAdvisor* or *Booking.com* reviews and/or scores. None of the hotels in Romania seem proud to be included in an official classification provided by *The Leading Hotels of the World*, *Travel+Leisure* or *World Best Hotels*, however more and more hotels are granted for the first time or some of them recurrent annual international awards like: *TripAdvisor Traveler's Choice*, *World Travel Awards*, *Five Star Alliance*, and *Condé Nast Traveler*.

Online reputation clearly affects hotel performance, with reviews being trusted information sources that provide travelers the chance to get a better picture of the property than by simply browsing through the official marketing communication or by asking peers (Horwath, 2016). From the hotel's perspective, reviews can improve hotels' service quality and online review data can be used to track improvements and to set measurable goals to achieve (PricewaterhouseCoopers, 2015).

The posting of false reviews can be easily overcome by using only qualified reviews and by only inviting tourists who have been accommodated; most Online Travel Agents limit the right to post reviews to those customers who have purchased a room on their site (UNWTO, 2014).

The focus on the transaction has always been a successful travel company's concern; today such enterprises go further improving booking possibilities by making them mobile and more flexible (Rafat, 2015a). Still, the ease of making a reservation on the hotel website involves much more than the mere existence of a booking form; important factors such as booking simplicity, requesting only essential information, providing clear information regarding room rates, etc. contribute to customer experience. Complex facilities, like storing purchase card details or customer information for future bookings, require secured and often costly applications.

A percentage of 15% of hotels do not have a reservation form on their website and 6% neither have a reservation form, nor a contact form. Therefore, customers who wish to close the deal on the spot have to contact the hotel and interact with the staff, while a survey revealed that more than 60% of the US consumers prefer to book online than to interact with the hotel staff (Ernst & Young, 2015).

In the light of Scott Cook's quote: "A brand is no longer what we tell the consumer it is – it is what consumers tell each other it is", the importance of the online advertising quality increases.

Today, mobile applications seem to control hotel services. *Virgin Hotels* and *Marriott*, early innovators, have extended the implementation of apps from ordering room-service, to controlling thermostats, in-room music and television, thus, connecting the client to the room (Grant, 2015). None of the investigated Romanian hotels implement dedicated apps for use within the hotel. Only 8% of the hotels (22% of the 5* and 6% of the 4*) provide information about their services and facilitate online check-in on their mobile apps; in fact, these are internationally branded hotels. There also are hotels under *Mercure* or *Best Western* brands that do not feature mobile apps in Romania, although the brands provide apps; perhaps, this requires additional fees or such facilities are not stipulated in franchise or management contracts.

Most hotels (80%) have a *Facebook* account but 4% of them have a personal profile, instead of a business one. Only 48% of the hotels provide the 'Book Now' button on their profile. Furthermore, 68% of the hotels having a *Facebook* account promote it on their own website, the other third failing to take advantage of this channel. Using mobile and Internet-based technologies, hotels that implement SM aim at enhancing and transforming communication into an interactive dialogue between the hotel, its existing and potential clients, and third parties. By doing so, hotels aim at increasing their market visibility, at strengthening their competitiveness and at enhancing consumer confidence (Negrușă, Rus, & Sofică, 2014). At the same time, Millennials, linked together by their powerful connection to the Internet, are intensive SM users and are permanently in contact (Euromonitor International, 2015). Moreover, Deloitte (2015b) emphasizes that SM has become truly integrated in the travel and hospitality decision-making process, generating both opportunities and threats for the hospitality industry, even highlighting any inconsistencies between brand pledges and their implementation. At global level, SM platforms are the second source of inspiration for holiday planning, after recommendations from family and friends, being followed by television programs, presentation brochures and search engines (Deloitte, 2015c). The power of SM results from the fact that people, especially "Digital Natives" love to share everything, from simple updates, to desires and achievements, thus, "if a hotel can use social media to associate – in the mind and heart of the consumer – the consumer's wished-for or actual achievements to the brand of the hotel, then loyalty will be generated" (PrivewaterhouseCoopers, 2013). Furthermore, Millennials' relation with brands and the use of smartphones is complex; although they are commonly willing to "like" or "follow" brands, this behavior is not necessarily translated into brand loyalty, rarely meaning that they would promote the brand, as they follow brands on SM only for getting access to deals, coupons and specialized information (Euromonitor International, 2015).

In Romania, 61% of the analyzed websites have links leading to the hotel's SM accounts: *Facebook*, *Twitter*, *Google+*, *Instagram*, *Stumble Upon*, *Pinterest* or *YouTube*. Broken links or links leading to a deleted page or websites that only feature *Facebook* or *Google+* logos, without actually linking to these accounts were also identified.

With adequate investment and interest, hotel websites can become a great tool for promoting services, offers and for direct sales. Unfortunately, most of the Romanian 4 and 5* hotels do not invest enough in their websites, several keeping websites static, neglecting improvements or updates on the long run. To avoid losing competitiveness, companies need to adapt their strategies to attract and retain constantly connected and informed consumers. The challenge is to be present and easily accessible to consumers throughout their entire travel experience, from sending notifications, providing continuous assistance at the destination, and making additional bookings during the travel, to motivating customers to contribute with online reviews.

While hoteliers develop and expect their websites to be effective marketing tools, travelers tend to trust more contents created by peers, who do not seek to hide negative aspects (Ady & Quadri-Felitti, 2015). Furthermore, one fifth of the leisure travelers downloaded a travel-related app because the hotel's website provided a negative experience (Google, 2014). Still, a *TripAdvisor* research revealed in 2013 that 74% of the travelers reviewed a hospitality facility (lodging, food- or leisure-service) to share a positive experience with their network and not because something went wrong or they wanted to share frustrations, as many businesses assumed (Gonzalo, 2015).

In Romania, 96.5% of the upscale and luxury hotels are present on *TripAdvisor*, 90% on *Booking.com*, and each one is also present on at least one specialized local platform but only 59% advertise these booking channels on their website.

Although false reviews are inevitable, a *PhoCusWright* study found that 98% of the respondents had found *TripAdvisor* hotel reviews to accurately reflect experiences, and that 95% would recommend *TripAdvisor* reviews to others. Furthermore, 53% of the respondents reject booking a hotel that does not have any guest reviews on the site (UNWTO, 2015).

The new generation of specialized tourism platforms encourages and facilitates a higher level of social interaction among tourists. It provides an appropriate environment to exchange information, share experiences and stick with people who trust this information in planning future trips. It also provides unprecedented opportunities for hoteliers to understand market reactions to what they offer and to achieve desired

results. For example, *TripAdvisor* reviews and scores help hotels gain better understanding concerning customers' likes or dislikes about their business, respectively of their competition.

A percentage of 51% of the Romanian hotels (58% of 5* and 51% of 4* hotels) appear on the first *Google* results page, when searching after their locality. Also, 36% occur in the first 5 results and 15% appear only after the first 5 results on the first page. Still, there is a small group of hotels (4%) that are the only ones of their classification in their locality but which do not appear on the first results' page. *Google Ads* is used by 81% of hotels, however only 51% of them appear on the first results' page. This situation highlights the reluctance of local managers to advertise hotel ratings, although this information can be easily found online by potential customers.

The correlation of the online performance with *Booking.com* scores and the prevailing average rates, led to the results illustrated in Figure 7.

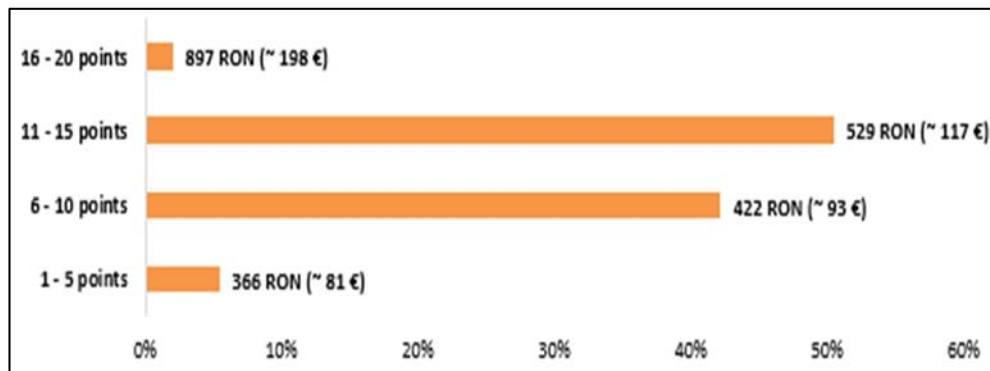


Figure 7. The 4 and 5* hotels' online performance correlated with the average prevailed rates

Source: Authors' processing

Most hotels have obtained a minimum of 6 and a maximum of 15 points, with an average of 10 points; on average, 5* hotels met 13 criteria and 4*, only 10. Combined with the hotels' rates, these figures highlight the impact of online promotion efforts, both through their websites and on other online means.

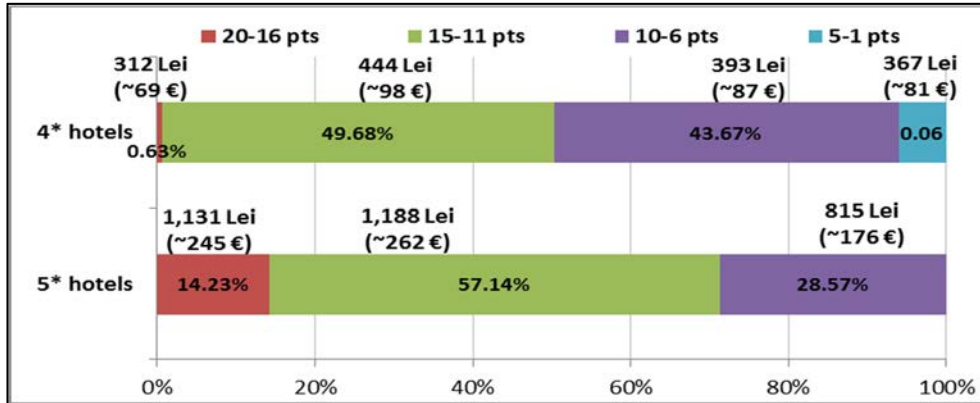


Figure 8. Ratings obtained by 4 and 5* hotels correlated with their average rates
Source: Authors' processing

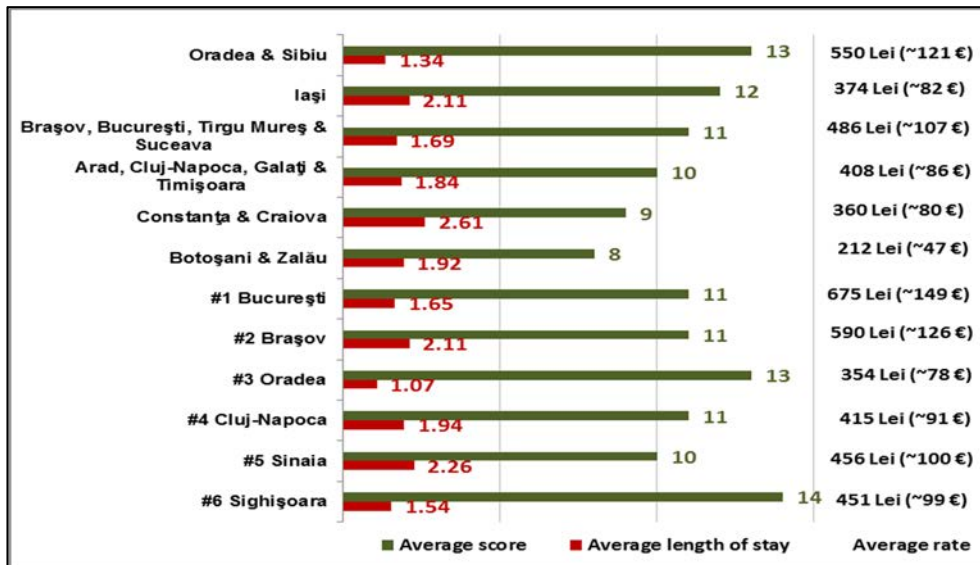


Figure 9. Hotel online performance in county residences and in the most popular Romanian destinations, correlated with Booking.com scores and prevailed average rates
Source: Authors' processing based on: NAT, 2015, NIS, 2015, hotel websites, Booking.com and TripAdvisor

Obviously, the number of criteria met has a high impact on average rates (as observed in Figure 8); thus, a low number of criteria met leads to

a significant drop in average rates, especially beginning with the range 15-11 points, which actually includes most of the hotels. As Figure 9 reveals, visible differences stand out when county residencies are analyzed.

County residencies that have a minimum of three hotels of 4 and 5*, which meet most criteria are Oradea and Sibiu (13 points each), Iași (12 points), and Brașov, Bucharest, Tîrgu Mureș and Suceava (11 points each). The impact upon the average rates charged is high, accounting for nearly 100 Lei (~22 €) for each criterion met.

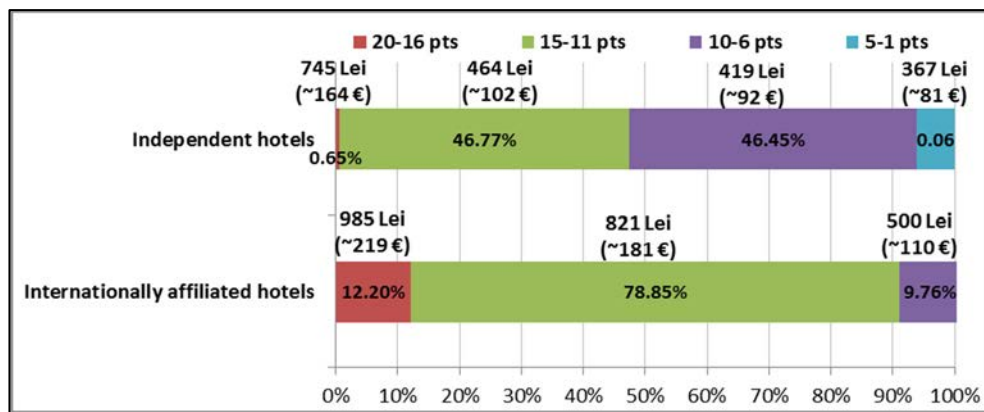


Figure 10. Scores of internationally affiliated hotels compared to independent hotels
Source, Authors' processing

By analyzing only the hotels affiliated to an international chain, one can observe that they obtained much higher scores, 12% having between 16 and 20 points, 78% between 11 and 15 points (compared to 47% for independent hotels) and the remaining 10% met a minimum of 8 points. As observed in Figure 10, internationally affiliated hotels meet on average 3 criteria more (13 points in total) than independent hotels or hotels belonging to a Romanian group. Consequently, "while information technology undoubtedly projects opportunities and benefits for hotel companies, its success largely depends on how hotels adopt and implement new technology. Of all the influential factors, hotel brand affiliation (i.e. chain or independent) plays a tremendous role in a hotel's inclination towards IT adoption." (Sigala, Christou, & Gretzel, 2012, p. 53).

Thus, for each of the four intervals there are significant differences between the average prevailed rates of internationally branded hotels compared to the independent ones.

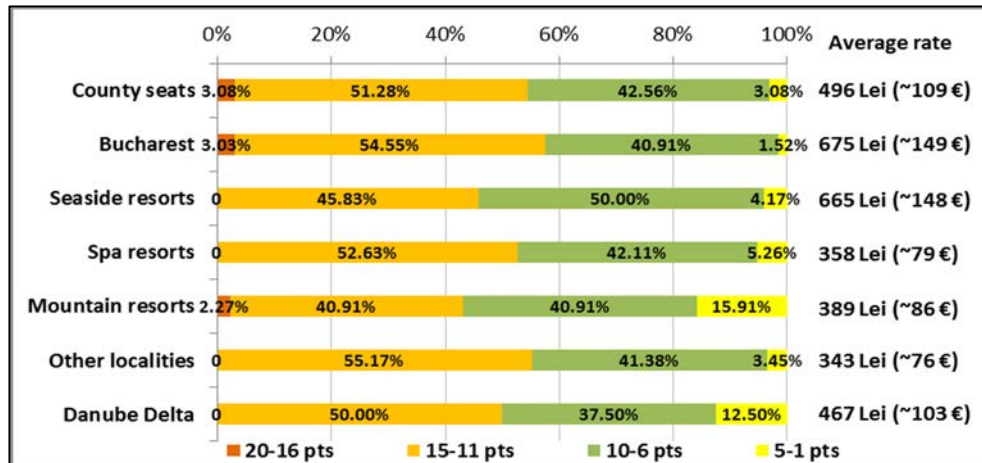


Figure 11. Hotel scores per tourist destination
Source: Authors' processing

Regarding hotel scores obtained per tourist destinations, as calculated in Figure 11, a number of 5 destinations had over 50% of the hotels scoring at least a minimum of 11 points (county Bucharest, residencies/seats, spas, other localities, and Danube Delta). Only three destinations host hotels which have met over 16 criteria (Bucharest, county residencies and mountain resorts).

According to *TripAdvisor*, in January 2015 (*TripAdvisor*), the most popular destinations in Romania were Bucharest and Braşov (11 points and an average rate of 560 Lei (~123 €), each), followed by Oradea (13 points and an average rate of 354 Lei (~78 €)), Cluj-Napoca (11 points), Sinaia (10 points) and an average rate of 456 Lei (~100 €) and Sighişoara (ranking 6th, with 14 points and an average rate of 451 Lei (~99 €)). In each of these cases, presented in Figure 9, there is a direct link between the scores obtained by each of these cities and the average prevailed rates by the hotels in these destinations.

The analyses show that Romanian hotels know how to advertise themselves better through other online means and SM than via their

websites. Only 15% of the hotels are distinguished with a national or international award, given the numerous weaknesses, together with the lack of mobility in increasing visibility and revenues, without loyalty programs that help promote hotels and with the lack of incentives for customers to contribute with reviews. Thus, the hotels that have received an international award have achieved an average of 14 criteria, have a minimum *Booking.com* score of 8.5 and their average rate is as high as 1,670 Lei (~367 €).

Booking.com, the world's largest OTA, has over 30 million qualified reviews (UNWTO, 2015). Of the 353 hotels, 86% of them are actively present on *Booking.com* (10.5% of 5* and the remainder of 4*). All of these hotels are also present on *TripAdvisor*. As it can be seen in Figure 12, the average review score was 8.3 for the total number of hotels of 4 and 5*, namely 8.3 for the 4* hotels and 8.6 for the 5* hotels. In 10 out of the 11 cases, when higher the review score on *Booking.com*, higher the number of criteria met.

Type	Score (points)	5* hotels			4* hotels		
		(%)	Average rate	B.	(%)	Average rate	B.
Total	20-16 pts	1.63%	1131 Lei (~245 €)	8.7	N/A	N/A	N/A
Affiliated		0.98%	1388 Lei (~306 €)	8.7	0.65%	313 Lei (~69 €)	8.8
Independent		0.65%	745 Lei (~164 €)	8.7	N/A	N/A	N/A
Total	15-11 pts	6.55%	1188 Lei (~262 €)	8.6	48.50%	445 Lei (~98 €)	8.4
Affiliated		2.25%	1924 Lei (~424 €)	8.6	8.15%	512 Lei (~113 €)	8.3
Independent		4.26%	793 Lei (~175 €)	8.6	40.30%	432 Lei (~95 €)	8.4
Total	10-6 pts	2.25%	794 Lei (~175 €)	8.3	37.30%	396 Lei (~87 €)	8.1
Affiliated		N/A	N/A	N/A	1.31%	500 Lei (~110 €)	8.5
Independent		2.25%	794 Lei (~175 €)	8.3	35.70%	393 Lei (~87 €)	8.1
Total	5-1 pts	N/A	N/A	N/A	3.27%	339 Lei (~75 €)	7.8
Affiliated		N/A	N/A	N/A	N/A	N/A	N/A
Independent		N/A	N/A	N/A	3.27%	339 Lei (~75 €)	7.8

Figure 12. Ratings of 4 and 5* hotels correlated with review scores and their average rates

Source: Authors' processing

Nowadays it is no longer sufficient to only reach targeted customers; businesses must know them in detail in order to be able to

provide personalized services and experiences. *Big Data* processing means using the best practices for integrating and analyzing large data sets, training and employing experts to manage them and then maintaining those efforts over time in order to reach their full potential. This often involves implementing specialized software and experts say that the ROI exceeds the initial high expenditure.

Hotels which use archaic systems face difficulties when gathering and processing information to share, compare, analyze, and visualize big data. Hotels need to update their decades-old customer-relations management systems, retrofitting their databases and user interfaces (Cendyn/ONE-Skift, 2015); in this context, employing data scientists becomes crucial (Gershkoff, 2015).

Today hotel service consumers interact with dozens of websites, digital channels and SM while planning and taking travel decisions; bookings are done on different mobile devices: laptop, smartphone, tablet, etc. Moreover, during their clients' stay, hotels can take full advantage of their mobile devices and increase interaction by advertising services (e.g. spa, restaurant, bar, room-service, etc.). Finally, after check-out, hotels can capitalize on their customers' experience by encouraging them to share it on the same digital means used for prior departure research; thus, the cycle is continued in the future by the same or by another potential client, as Deloitte (2015a) points out: "the consumer journey has changed from a linear path to a cycle, where each consumer's experience feeds into another consumer's decision process." Furthermore, as people use their mobile devices increasingly when booking flights and hotels or for other travel-related purchasing (all amounting \$96 billion and accounting for 12.5% of global online sales in 2014), hospitality enterprises will soon be able to use collected data for personalizing their offers (Young, 2015).

Many of the analyzed hotels use obsolete or inappropriate software, such as *HostWare*, *Freya Hotel* or *Saphir Hotel by Ram-Tech*, each focusing on single and unique transactions, and on the customer's blacklist history. Other software, like *SoftBrands Medallion*, *Imperial Rooms* or even *MS Office Excel*, in some cases (without understanding pivots or complex formulas) make it difficult if not impossible to gather, process and analyze big data. Most software solutions resume to

providing only simple reports (accommodation, check-out, night-audit, revenue reports), without any specific or recurrent customer insights; furthermore, very often it is impossible to choose factors for generating a personalized report. Still, although affordable software, such as *Vilicotel*, *HoteloPro*, *Micros Opera* and *Micros Fidelio* are available; these store a history of services per each individual customer, these features are rarely used. Overall, hotels lag behind when it comes to technology implementation and to capitalizing on the benefits of big data processing that enables businesses to correlate SM profiles with customer preferences, to gain their loyalty (Cendyn/ONE-Skift, 2015). Four steps can, and should, be undertaken in this respect: to connect all data from disparate brand systems into a single repository, to generate previously unidentified guest-behavior patterns; to use software to organize, analyze, and extract the details from the gathered data; to employ data scientists, trained and capable of visualizing, processing and interpreting data; to implement IT&C solutions that track and measure the impact of big data usage (Cendyn/ONE-Skift, 2015). Eventually, the results obtained from big data analyses lead to identifying relations, patterns and trends otherwise not visible, further used in segmenting and targeting desired customers.

While mature digital businesses focus on integrating digital technologies (SM, mobile, analytics, and cloud) in their service, less-mature digital businesses (e.g. the hospitality industry in Romania) focus on solving discrete business problems with individual digital technologies (Deloitte, 2015d). Today, when customers are highly unpredictable and digital channels seduce marketers who feel anyone can be reached, segmenting and targeting become essential. SM and digital channels are social for customers but businesses must treat them as highly valuable sources of information and tools for loyalty building. As opposed to traditional marketing, digitalization provides access to identities, mindsets and behaviors, essential competitive advantages and complex marketing toolboxes for any business. Interaction with customers becomes truly in-depth, thus “the people tasked with using the digital media should be champions of the company’s business goals and whatever will achieve them, not champions of Twitter or Facebook or LinkedIn” (Deloitte, 2015c).

Top-managers play a key role in allotting resources and adopting new technologies, as they must be able to comprehend and estimate their future positive impact (Deloitte, 2015d). While independent hotels' managers see digitalization as a defense mechanism against the fear of lagging behind the competition, top managers of chain hotels perceive technology adoption as a strategic marketing decision, providing customer understanding and retention (Sigala, Christou, & Gretzel, 2012, p. 61).

Romanian upscale and luxury hoteliers should consider the following recommendations:

- to stay updated with the essential current technologies to better promote properties online;
- to improve the properties' facilities, to constantly train employees and increase awareness that they are the ones providing added value to the business;
- use online reviews as insights into customers' minds and as a resource to improve the properties' facilities and provided services;
- to motivate guests with incentives (coupons, discounts, etc.) to share their experience online;
- to parse and analyze guest-related information and to use data to provide a personalized guest-experience.

4. Conclusion

The current state of digital technologies in Romanian hospitality businesses is not surprising, given the rapid development of digital marketing in general. However, companies should not underestimate the challenge, if companies still want to exist in the future and not to be stuck with poor revenues, they cannot continue using yesterday's technology. Some future research directions can further discuss the development of upscale and luxury hotels and can also cover 3-star hotels, respectively other hospitality businesses, too (e.g. upscale and luxury restaurants – internationally branded or independent, travel agencies, and destinations and DMOs).

The main findings of the paper focus on the criteria met by 4 and 5* hotels on their websites and in the online environment:

- most hotels (97%) have a website but only 70% of them provide a positive experience;
- 11% of the 5* hotels and 20% of the 4* hotels have websites available only in Romanian, while foreign tourist arrivals have reached 68% in 5* hotels and 38.1% in 4* hotels in 2016;
- only 40% of the websites are responsive/mobile-friendly;
- many websites (80%) feature the *Google Maps* widget but only 36% are also responsive/mobile-friendly;
- 15% of the websites do not have a reservation form and 17% display incomplete information about rates or none at all;
- only 23% of the independent hotels or affiliated to Romanian groups promote loyalty programs on their websites;
- although 90% of the hotels are present on *Booking.com* and 97% on *TripAdvisor*, only 4% advertise scores on their websites and only 11% have a special testimonial-section;
- less than 10% of the hotels received international awards;
- although 80% of the hotels have a *Facebook* account, only 48% of them provide booking facilities, and 32% do not advertise profiles on their websites;
- only 8% of the hotels (all internationally branded) offer mobile apps for online check-in;
- 81% of the hotels use *Google AdWords*, however only 51% appear on the first *Google* results page by their locality.

These results highlight the importance of hoteliers to embrace useful advice and guidelines on capitalize on digitalization and to better present their properties online, respectively how to maximize the interaction with their customers and potential guests.

REFERENCES

1. Ady, M., & Quadri-Felitti, D. (2015). *The Effect of Reviews on Hotel Conversion Rates and Pricing*. Retrieved October 03, 2017, from Trust You: <http://marketing.trustyou.com/acton/attachment/4951/f-02bb/1/-/-/-/-/The%20Effect%20of%20Reviews%20on%20%20Hotel%20Conversion%20Rates%20and%20Pricing.pdf>
2. Anderson, C. (2012). The impact of social media on lodging performance. *Cornell Hospitality Report*, 12(15), 6-11.
3. Autoritatea Națională pentru Turism/Ministerul Turismului. (2015, August 26). *Structuri de cazare clasificate*. Retrieved November 20, 2015, from <http://turism.gov.ro/agentii-de-turism-si-structuri-autorizate/>
4. Badea, E. (2016, January 05). *Cinci tendinte majore care se vor impune in marketing si comunicare in 2016*. Retrieved 10 05, 2017, from <http://www.eyromania.ro/2014/noutati/articole/cinci-tendin%C8%9Be-majore-care-se-vor-impune-%C3%AEn-marketing-%C8%99i-comunicare-%C3%AEn-2016>
5. Cendyn/ONE-Skift. (2015). *From Data to Action: The Future of Hospitality Marketing*. Skift. Retrieved September 28, 2017, from <http://products.skift.com/trend/from-data-to-action-the-future-of-hospitality-marketing/>
6. Deloitte. (2015a). *Travel Consumer 2015: Engaging the empowered holidaymaker*. Deloitte LLP. Retrieved October 25, 2017, from *Travel Consumer 2015: Engaging the empowered holidaymaker*: <https://www2.deloitte.com/content/dam/Deloitte/pe/Documents/strategy/deloitte-uk-travel-consumer-2015.pdf>
7. Deloitte. (2015b). *Hospitality 2015: Game changers or spectators?* Deloitte LLP. Retrieved October 03, 2017, from http://www.fairtrade.travel/uploads/files/Hospitality_2015_Deloitte_report.pdf
8. Deloitte. (2015c). *Social? That's for Consumers. For Travel Companies, Social Media Means Business: as Digital Channels Mature in Scope and Power, the Industry Needs to Catch Up*. Deloitte LLP & Facebook. Retrieved October 10, 2017, from <https://www2.deloitte.com/content/dam/Deloitte/global/Documents/Consumer-Business/gx-cb-thl-facebook-digital-channels-travel.pdf>

9. Deloitte. (2015d). *Strategy, Not Technology, Drives Digital Transformation: Becoming a Digitally Mature Enterprise*. MIT Management Review and Deloitte University Press. Retrieved October 24, 2017, from <http://www2.deloitte.com/global/en/pages/technology/articles/deloitte-social-business-study.html>
10. Deloitte. (2017). *2017 Travel and Hospitality Industry Outlook*. Deloitte Center for Industry Insights. Retrieved October 22, 2017, from www.deloitte.com/us/travel-hospitality-trends
11. Ernst & Young. (2013). *The Hospitality Sector in Europe: An assessment of the economic contribution of the hospitality sector across 31 countries*. Ernst & Young. Retrieved from [http://www.ey.com/Publication/vwLUAssets/The_Hospitality_Sector_in_Europe/\\$FILE/EY_The_Hospitality_Sector_in_Europe.pdf](http://www.ey.com/Publication/vwLUAssets/The_Hospitality_Sector_in_Europe/$FILE/EY_The_Hospitality_Sector_in_Europe.pdf)
12. Ernst & Young. (2015). *Global hospitality insights: Top thoughts for 2015*. Ernst & Young - EYGM Limited. Retrieved October 05, 2017, from <http://www.ey.com/GL/en/Industries/Real-Estate/ey-global-hospitality-insights-2015>
13. Euromonitor International. (2015). *The Impact of Millennials' Consumer Behaviour on Global Markets*. Euromonitor International. Retrieved October 20, 2017, from <http://go.euromonitor.com/free-report-millennials-consumer-behaviour.html>
14. Freeman, B. (2015, April 15). *News-Insights: Use technology to achieve competitive differentiation*. Retrieved October 18, 2017, from <http://ehotelier.com/insights/2015/04/15/use-technology-to-achieve-competitive-differentiation/>
15. Gershkoff, A. (2015, December 31). *How to Stem the Global Shortage of Data Scientists*. TechCrunch. *The Crunch*. Retrieved October 18, 2017, from <http://techcrunch.com/2015/12/31/how-to-stem-the-global-shortage-of-data-scientists/>
16. Gonzalo, F. (2015, May 04). *When Responding to Online Reviews, Speed Matters*. *eHotelier*. Retrieved September 18, 2017, from <http://ehotelier.com/insights/2015/05/04/when-responding-to-online-reviews-speed-matters/>
17. Google. (2014). *The 2014 Traveler's Road to Decision*. Google Inc. Think with Google. Retrieved September 29, 2017, from https://storage.googleapis.com/think/docs/2014-travelers-road-to-decision_research_studies.pdf
18. Google. (2015). *Hilton Worldwide Drives 12% Higher ROI With Google Hotel Ads*. Advertising Channels, Mobile, Travel, Marketing Resources. Think with Google. Retrieved from thinkwithgoogle.com

19. Grant, M. (2015, May 19). The Hotel Smartphone App Will Control Room Service and Everything Else. *Skift. Digital*. Retrieved September 28, 2017, from <http://skift.com/2015/05/19/the-hotel-smartphone-app-will-control-room-service-and-everything-else/>
20. Horwath. (2016, April). *How online reputation affects hotel trading performance*. Retrieved September 27, 2017, from <http://horwathhtl.com/files/2016/04/How-Online-Reputation-Affect-Hotel-Trading-Performance.pdf>
21. Lema, J. D. (2009). Preparing Hospitality Organizations for Self-Service Technology. *Journal of Human Resources in Hospitality & Tourism*, 8, 153-169.
22. Minardi, P. (2015, May 06). #NTTW2015: Celebrating Travel Innovation And Transformation. Retrieved November 09, 2017, from Travel Tech: http://www.traveltech.org/news&a=view&article_id=121
23. National Institute of Statistics. (2017, March 30). *TEMPO-Online: Tourism*. Retrieved October 20, 2017, from National Institute of Statistics: <http://statistici.insse.ro/shop>
24. Negrușă, A. L., Rus, R. V., & Sofică, A. (2014). Innovative Tools Used by Business Networks and Clusters in Communication. *Procedia. Social and Behavioral Sciences* (pp. 588-594). Elsevier.
25. PricewaterhouseCoopers. (2015). *Online reputations. Why hotel reviews matter and how hotels respond*. June. Retrieved September 28, 2017, from <https://www.pwc.at/de/publikationen/pwc-global-hotels-report-2015.pdf>
26. PrivewaterhouseCoopers. (2013). *How can hotels achieve the right kind of growth in a digital age? A toolkit for fighting commoditisation*. PrivewaterhouseCoopers LLP (PwC). Retrieved October 21, 2017, from www.pwc.co.uk/hospitality-leisure
27. Rafat, A. (2015a, January 13). Megatrends Defining Travel in 2015. *New Skift Magazine. Digital*. Retrieved September 27, 2017, from <http://skift.com/2015/01/13/new-skift-magazine-megatrends-defining-travel-in-2015>
28. Rafat, A. (2015b, April 08). Travel Brands in a Multi-screen World. *New Free Skift Report. Digital*. Retrieved September 29, 2017, from <http://skift.com/2015/04/08/free-skift-trend-report-travel-brands-in-a-multi-screen-world/>
29. Rus, R. V., & Negrușă, A. L. (2014). Online hotel booking systems in Romania. *Procedia Economics and Finance* (pp. 1235-1242).
30. Sigala, M., Christou, E., & Gretzel, U. (2012). *Social Media in Travel, Tourism and Hospitality: Theory, Practice and Cases*. New York: Routledge.

31. Skift. (2015a). State of Travel 2015: Europe. New York, NY, USA. Retrieved from <http://products.skift.com/trend/free-data-deck-state-of-travel-2015-europe/>
32. Skift-Boxever. (2015). *What Travel Brands Can Learn From Behavioral Economics*. Skift-Boxever. Retrieved 10 25, 2017, from <http://products.skift.com/trend/free-report-what-travel-brands-can-learn-from-behavioral-economics/>
33. TripAdvisor. (2015, January). *Popular Destinations in Romania*. Retrieved January 25, 2015, from <http://www.tripadvisor.com/Tourism-g294457-Romania-Vacations.html>
34. UNWTO. (2014). *Online Guest Reviews and Hotel Classification Systems – An Integrated Approach*. Madrid: World Tourism Organization. Retrieved October 06, 2017, from https://static.hosteltur.com/web/uploads/2014/10/OMT_clasificaciyn_hotelera_comentarios_clientes.pdf
35. UNWTO. (2015). *Hotel Classification Systems: Recurrence of criteria in 4 and 5 star hotels*. Madrid: World Tourism Organization. Retrieved October 15, 2017, from <http://europe.unwto.org/publication/hotel-classification-systems-recurrence-criteria-4-and-5-star-hotels>
36. World Best Enterprises. (n.a.). *World Best Website Awards*. Retrieved October 28, 2015, from <http://www.worldbestwebsites.com/criteria.htm>
37. World Economic Forum. (2015). *The Travel & Tourism Competitiveness Report 2015: Growth through Shocks*. Geneva: World Economic Forum.
38. World Economic Forum. (2017). *The Travel & Tourism Competitiveness Report 2017: Paving the way for a more sustainable and inclusive future*. Geneva: World Economic Forum.
39. Young, S. (2015, November 02). Mobile Technology Making Further Inroads into In-Market Travel Decisions. *Skift&Reuters*. Retrieved September 29, 2017, from <http://skift.com/2015/11/02/mobile-technology-making-further-inroads-into-in-market-travel-decisions/>