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Competitive Analysis of Indian Tourism Aggregators Using Multi-Criteria Analytic Hierarchy Process

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Abstract

Tourism has been a major social phenomenon in societies all over the world. It is driven by the human desire for new experiences, and the desire to be educated and entertained. The spread of education and the technological improvements in communication have strengthened the basic human thirst for new knowledge and experience and have fostered a desire to know more about different parts of the world.

Tourism has been revolutionised with the emergence of tourism aggregators, i.e. web-based portals that provide travellers with services such as travel, accommodation, and tour planning and booking. The tourism aggregators have reduced information search costs, and have increased the awareness of tourists of potential destinations. This has enabled some innovative trends in tourism, including eco-tourism, adventure tourism, heritage tourism, medical tourism, pilgrimage tourism, and so on.

The objective of the study is to compare the competitiveness of Indian tourism aggregators using the Analytic Hierarchy Process (AHP). AHP is a technique that is used to structure multi-criteria decisions, allowing both quantitative and qualitative comparisons between alternatives (Saaty and Forman, 1992; Saaty, 2008). The criteria used for the study include price, process, ease of access, and customer service. The tourism aggregators selected for the study include Yatra, Makemytrip, Goibibo, Cleartrip, Expedia, and Kuoni-SOTC.

Keywords: Tourism Aggregators, Travel Accommodation, Tour Planning, Analytic Hierarchy Process

Introduction

In the twenty-first century, tourism has emerged as a strong economic force for development. According to the 2015-16 report of Ministry of Tourism, Govt. of India, 'Tourism is accepted as the potent engine for inclusive social economic progress at universal level through its forward and backward linkages and ability to create employment in the economy.' Tourism has direct role in employment generation and poverty eradication sustainably for all segments of society. The Government of India seems oriented in this direction. The gradual increase in FTAs and tourism revenue is an indicator of Tourism India being in forefront. In 2015 FTAs in India increased by 4.5%, and the corresponding Foreign Exchange Earnings (FEEs) from tourism witnessed a growth of 9.6%. Government initiatives like TVA[1] with ETA[2] (e-Tourist Visa), 24x7 multi-lingual tourist help is now witnessing the result; in 2015-16 4,45,300 tourists used e-Tourist facility. The facility is available at sixteen airports for one hundred and fifty nationalities. Two tourism schemes were also launched; Swadesh Darshan and PRASAD[3].

Tourism India is a 365 days' tourist destination. The Indian tourism industry can be classified in variety of ways based on criteria:

[1] Tourist Visa on Arrival
[2] Electronic Travel Authorisation
[3] Pilgrimage Rejuvenation and Spiritual Augmentation Drive

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Based on Geography	Based on Activities involved	Niche Tourism
East, West, North and South India, North-East Tourism	Adventure tourism involves exploration or travel to remote, exotic areas. *Any constructive activity which tests the endurance of both a person and his equipment to its extreme limit is termed as adventure*. e.g. Skiing, Mountaineering	Golf Tourism Cruise Medical Wellness Polo MICE Eco-tourism Film Tourism Sustainable Tourism

Tourism in India is reconstructing itself with the help of digital technology. The Ministry of Tourism has set up a web-based public delivery system with the objective of receiving application and giving approval online. More so grant approval for hotel projects, classification/ re-classification, etc. have also gone online with integrated payment gateway. Also, a mobile application called Swachh Paryatan is also launched to assist people in reporting unattended garbage piles at various tourist destinations across the country.

Tourism is a part of everyone's life. A situation where people from one country or region visit another country or region for a short period of time. The tourism industry in India has gained great importance due to the rich heritage, culture and the various other facilities that they offer in terms of health, relaxation and luxury. Since the year 2000 tourism industry has been giving a number of benefits to India. The number of foreign tourist's visits to India have been on a gradual rise, which has also been contributing to foreign exchange earnings to the country.

Market1Size

The market size is expanding fast, number of Foreign Tourist Arrivals (FTAs) has grown steadily in the last few years reaching around 8.89 million during 2016 which was 10.7% more than 2015. FFE from tourism in rupees terms is growing. In 2015 it registered a growth of 9.6% with Rs. 1,35,193 crore. Domestic tourism is also on rise with a growth of 12.92% over 2013. Contribution of tourism in India's GDP is 6.3% in 2015-16 (knoema.com). Contribution in employment is 8.7% in 2015-16. In 2016, tourism contributed to direct GDP growth of 3.1% and supported 6 million net additional jobs. In total, travel and tourism generated US$ 7.6 trillion (10.2% of global GDP) and 292 million jobs in 2016, equivalent to 1 in 10 jobs in the global economy.

Investments

Travel and tourism investment in 2014 was Rs. 2,107 billion, or 6.2 % of total investment. It should grow by 6.5% p.a., over the next 10 years, to Rs. 4,337.8 billion in 2025 (6.9% of total).

The economic contribution of travel and tourism can be described by following diagram:

Economic Contribution of Travel and Tourism

INDIA	*2016 US$ bn*[1]	*2016 % of total*	*2017 Growth*[2]
Direct contribution to GDP	717	3.3	6.9
Total contribution to GDP	208.9	9.6	6.7
Direct contribution to employment	25.95	5.8	2.1
Total contribution to employment	40343	9.3	1.8
Visitor exports	22.8	5.3	5.4
Domestic spending	167.4	7.7	7
Leisure spending	180	3.1	6.9
Business spending	10.3	0.2	5.5
Capital investment	34	5.7	4.5

[1]2016 constant prices & exchange rates, [2]2017 real growth adjusted for inflation.

Source: WTTC, Travel & Tourism Economic Impact 2017, India

Major players in Tourism Industry

Accommodation and Catering

Growing consistently since 1995/96 from just 120 hotels with about 18,000 branded/organized rooms to a record 887 hotels with a room count of 1,13,622 in 2015/16. The growth in hotels and restaurants segment was estimated at 21.5% during 2015/16. Also, hotel and tourism ranked as one of the top ten sectors to attract the highest FDI, contributing 3% of the total inflow. Further, the introduction of GST (Goods and Services Tax) will improve the growth factor by decent points as it will replace the indirect taxes on all goods and services.

Leisure travel is on rise, the WTT+S estimates that leisure travel spending (inbound and domestic) generated 83.2% of the direct travel and tourism GDP (Rs.5,045.5bn) in comparison to 16.8% from business travel spending. The market-wide occupancy was healthy at 63.4% in 2015/16. RevPAR (Revenue Per Available Room) was recorded at Rs.3,512 in 2015/16, a significant growth of 6.1% over the preceding fiscal. The existing room supply grew by 5.5% in 2015/16 totaling to 1,13,622 rooms (highest supply growth in Agra followed by Ahmedabad and New Delhi).

Transportation

During 2015/16, transport industry registered strong growth. In aviation sector India is now 3rd largest market in domestic air passenger traffic at 100 million in 2016, behind only US (719 million) and China (436 million).

The Indian passenger vehicle industry has grown by 7.2% during FY2016, in line with ICRA's expectation of 7%-8% growth during the year. The domestic passenger vehicle sales has been supported by new model launches by incumbents as well as new entrants, discount push from OEMs and improved customer sentiments in the backdrop of recovery in the overall economy. The passenger car segment, which constitutes 73% of the domestic volume, grew by 7.9% followed by 6.3% in utility vehicles and 3.6% in the van segment

Tourist Information Centres

The aim of tourist information centres is to find popular places of interest. With this, various tourism related information are also shared with interesting parties. Food, accommodation, attractions, packages, other support infrastructures are important information that information centres can share with tourists. There are public centres and private as well. Information centres fulfil key requirement of knowledge dissemination.

Travel Agents and Tour Operators

They are one of the main parties in tourism business. Travel agents mainly work on fees for arranging tourism products for customers. Tours operators means any person engaged in the business of planning, scheduling, organising or arranging tours (which may include arrangements for accommodation, sightseeing or other similar services) by any mode of transport, and includes any person engaged in the business of operating tours in a tourist vehicle or a contract carriage by whatever name called, covered by a permit, other than a stage carriage permit, granted under the Motor Vehicles Act, 1988 (59 of 1988) or the rules made thereunder (CBEC, Department of Revenue, Ministry of Finance, Government of India).

Online Travel Services

India's online travel segment constitute 41% of the overall Indian travel market (2014). The online travel market, estimated at US$ 9.1 billion (2014), comprised air travel (US$ 5.1 billion), rail (US$ 3.1 billion), hotels (US$ 0.8 billion), and others (US$ 0.1 billion). Online penetration in travel and tourism booking is expected to rise to 46% in 2017. Internet penetration in India is low at 17%. Key online travel agencies are Makemytrip (47%), Cleartrip (20%), Yatra.com (20%), and others (13%).

Online hotel segment in India is under-penetrated, with only 10% of hotels accepting bookings online, while the overall user-base of people seeking information on hotels online was very high. Online penetration of airline in travel segment stood at 52%, followed by rail travel at 43%, \hotel at 10%, and car rentals at 11%.

Tourism Aggregators

Aggregators refers to a web site or computer software that aggregates a specific type of information from multiple online source. In other words Aggregator website search

for deals across multiple website and shows up the results in one place. Travel Aggregator makes life simple e.g. one can sit down in front of system and search on individual website for offers and deals instead the comparative offers and deals can be searched in one go by visiting aggregators website as yatra.com, makemytrip.com, tripadvisor,com, goibibo.com etc. that will check hundreds of airlines at once and show you the one range from least priced to most expensive in an order. Travel Aggregators or Meta-search sites are multiple travel search engines in one place. Manual searching individual site is tedious and doesn't guarantee cheaper product. There are multiple Aggregators are available in Indian market for tourism products.

Challenges in Developing Tourism Specific Aggregators

Tourism is service dominant product and it's a fragmented industry consisting of many small-sized service providers such as restaurants and lodging facilities as bed and breakfast establishment and tour operators (Wertner & Klein, 1999). Tourism is an intangible and experiential good; that is, a sample test or prior assessment of standard is extremely difficult without actual experience of real purchase. This gives rise to the high risk involved in decision making (Roehl & Fesenmaier, 1992), leading to extensive search for information. Second, travel decision making involves a complex and multi-faceted decision process that is influenced by numerous kinds of constraints (Jeng & Fesenmaier, 2002). Thirdly, travel decisions are highly-context driven and individual-based (Gretzel, Hwang, & Fesenmaier, 2006). The critical success points in aggregators business are Price, Product, Convenience, and Customer Service. Smith states that availability of free information does not ensure that customers will use it; this will depend on reliability of and trust in the supplier. If the services offered by these websites are increased coupled with display of relevant information about destinations, the Indian customer would be encouraged to visit these websites and use them for vacation planning (Khare and Khare, 2010).

Methodology

The analytic hierarchy process (AHP) is a technique that is used to structure multi-criteria decisions, allowing both quantitative and qualitative comparisons between alternatives. The first step of AHP is that of formulating the problem and stating the objective. The second step is that of identifying the criteria that contribute to the objective. The third step is that of performing pairwise comparisons between the criteria, and between the alternatives under each of the criteria. The weightages for each of the criteria and for each alternative under each of the criteria are obtained from the pairwise comparison matrices. The final step is that of combining the weightages of the alternatives, and selecting the alternative with best weighted average (Saaty and Forman, 1992; Saaty, 2008).

The criteria used for the study include price (x_1), product (x_2), convenience (x_3), and customer service (x_4).

The price factor includes aspects such as the fares/rates, discounts, promotional offers, booking charges, different payment modes, and so on. Of these, the most important was considered to be the fares/rates, as these can vary widely due to dynamic pricing. To compare the fares/rates offered by different tourism aggregators, a sample of flight bookings and hotel bookings was taken for a fixed set of sample periods, and their mean, standard deviation, and maximum values were compared.

The product factor includes consideration of the variety of products offered, the number & range of service providers hosted, the availability of flights/hotel bookings, the attractiveness of design of the website, the features included on the website, and so on. This was assessed by comparing the website design for the tourism aggregators.

The convenience factor is concerned with aspects such as the ease with which customers can search for/find the website and information related to products on the website, the ease of buying the product, and so on. To assess these aspects, search engine optimization (SEO) and web analytics statistics were collected from the analytics websites https://www.similarweb.com, www.freeseodoctor.com, and https://seositecheckup.com.

Technology has facilitated the access for tourism. Travellers opt for interactive choice, product and service quality and sufficient necessary information to help them deciding faster.

Poon and Joseph (2001) posit that electronic commerce increases customers' purchasing and transaction benefits. Tourism has crossed borders and regions and has become

global phenomenon in the age of technology. According to Rayport and Sviokla (2000), the intangible nature of the services makes technology-arbitrated models readily accepted in services. 'Online travel agents provide a point of contact for customers through World Wide Web to facilitate customers in searching for appropriate travel planning, which is then booked and ticketed by the online travel agents'. Travellers today look for interactive, quality, fast and anytime accessible tourism services from aggregators. Global travel industry has added technology as an essential tourism element.

The customer service factor focuses on the quality of service support offered by the tourism aggregators to their customers. This is assumed to be reflected in customer satisfaction as well as customer complaints. To assess this factor, the customer reviews, complaints, and ratings recorded on the consumer feedback website www.mouthshut.com were collected and compared for the tourism aggregators.

The tourism aggregators considered for the study include Yatra (y_1), Makemytrip (y_2), Goibibo (y_3), Cleartrip (y_4), Expedia (y_5), and Kuoni-SOTC (y_6).[4]

Analysis & Findings

The paired comparison matrix for the criteria is presented in Table 1. The resulting weightages for the criteria are shown in Table 2.

Table 1: Pairwise Comparison Matrix for the Criteria

	x_1	x_2	x_3	x_4
x_1	1	1/3	1/4	1/6
x_2	3	1	1/3	1/5
x_3	4	3	1	1/4
x_4	6	5	4	1

Table 2: Criteria Weightages

	weightage
price	0.063753
product	0.126210
convenience	0.235222
customer service	0.574815

[4] https://www.ibef.org/industry/tourism-hospitality-india/showcase

The most important criterion was found to be customer service, followed by convenience, product, and finally price.

The pairwise comparison matrices for the selected tour operators under each of the criteria are presented in Tables 3-6 below. The comparison tables for each of the criteria are presented in the Appendix.

Table 3: Pairwise Comparison Matrix for Price

	y_1	y_2	y_3	y_4	y_5	y_6
y_1	1	2	3	3	3	1/4
y_2	1/2	1	3	2	4	1/4
y_3	1/3	1/3	1	1/4	1/3	1/5
y_4	1/3	1/2	4	1	2	1/5
y_5	1/3	1/4	3	1/2	1	1/3
y_6	4	4	5	5	3	1

Table 4: Pairwise Comparison Matrix for Product

	y_1	y_2	y_3	y_4	y_5	y_6
y_1	1	5	3	7	3	3
y_2	1/5	1	2	5	3	2
y_3	1/3	1/2	1	4	2	2
y_4	1/7	1/5	1/4	1	1/3	1/3
y_5	1/3	1/3	1/2	3	1	1/3
y_6	1/3	1/2	1/2	3	3	1

Table 5: Pairwise Comparison Matrix for Convenience

	y_1	y_2	y_3	y_4	y_5	y_6
y_1	1	1/4	1/1.5	1/3	5	6
y_2	4	1	3	2	7	9
y_3	1.5	1/3	1	1/2	6	6
y_4	3	1/2	2	1	7	8
y_5	1/5	1/7	1/6	1/7	1	3
y_6	1/6	1/9	1/6	1/8	1/3	1

Table 6: Pairwise Comparison Matrix for Customer Service

	y_1	y_2	y_3	y_4	y_5	y_6
y_1	1	3	6	6	9	4
y_2	1/3	1	6	6	9	4
y_3	1/6	1/6	1	3	4.5	1/4
y_4	1/6	1/6	1/3	1	4	1/4.5
y_5	1/9	1/9	1/4.5	1/4	1	1/6.5
y_6	1/4	1/4	3	4.5	6.5	1

The scores for each of the companies under each of the criteria and the overall AHP scores are presented in Table 7 below.

In terms of price, Kuoni-SOTC was found to dominate the industry, followed by Yatra and Makemytrip. In terms of product, Yatra was the industry leader, followed by Makemytrip and Goibibo. In terms of convenience, Makemytrip was dominant, followed by Cleartrip and Yatra. Finally, in terms of customer service, Yatra was at the top, followed by Makemytrip and Kuoni-SOTC. Overall, the market leader was Yatra, followed by Makemytrip, Kuoni-SOTC, Goibibo, Cleartrip, and Expedia.

Table 7: Criteria Scores and Overall AHP Scores

	price	*product*	*convenience*	*customer service*	*AHP score*
Yatra	0.191904	0.399681	0.207584	0.404521	0.344032
Makemytrip	0.156780	0.197563	0.338079	0.278721	0.274666
Goibibo	0.046830	0.152237	0.150699	0.078234	0.102617
Cleartrip	0.108054	0.038496	0.237665	0.054117	0.098759
Expedia	0.084485	0.084245	0.041730	0.024661	0.040010
Kuoni-SOTC	0.411947	0.127779	0.024243	0.159746	0.139917

Discussion

Tourism has been revolutionised with the emergence of tourism aggregators, i.e. web-based portals that provide travellers with services such as travel, accommodation, and tour planning and booking. The tourism aggregators have reduced information search costs, and have increased the awareness of tourists of potential destinations.

Yatra was found to be the industry leader among tourism aggregators. It was dominant in the industry in terms of customer service and product, however, it lagged behind in terms of convenience and price. It would need to improve its pricing and web traffic in order to strengthen its position in the industry.

The market challenger is Makemytrip, which dominates over Yatra in terms of convenience. It has better marketing and promotional strategies, giving it higher visibility on the internet.

Kuoni-SOTC is also an emerging market challenger, dominating in terms of price. It would need to dramatically improve its web traffic to gain in the market.

Overall, the results of the study show that industry is highly competitive. Yatra may dominate in some parameters, but it is not totally dominant. In fact, it does not dominate in terms of price, which gives scope for competitors as economy customers are highly price-sensitive. Also, it does not dominate in terms of web traffic, which again gives scope for competitors as customers are increasingly engaged in social media. Thus, the industry is likely to be in a constant state of flux.

There are several limitations inherent in the study. The study considered only certain criteria, but these may not be sufficient to capture all aspects of tourism aggregators. Further, each of the criteria have sub-criteria, and a direct pairwise comparison of the criteria may be misleading. Also, pairwise comparison of the tourism aggregators under some criteria may be difficult due to contradictory assessments under the sub-criteria. A hierarchical AHP approach may be more suitable in this context. Finally, the data was collected from the websites at a particular point in time; due to the nature of dynamic pricing, however, there could be random fluctuations in prices at the time of the sampling, so that the sample prices may be extreme values, not necessarily reflecting the true distribution of prices. To overcome this limitation, data would have to be resampled over a period of time.

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Appendix

Price Comparisons:

Bangalore - New Delhi						
	Sept. 1 - 7	***Sept. 3 - 10***	***Sept. 5 - 12***	***Sept. 8 - 15***	***Sept. 12 - 20***	***Sept. 15 - 23***
Yatra	8077	8654	6836	5778	5669	5778
MakeMyTrip	8337	8185	6836	5778	5669	5778
GoIbibo	8327	9353	6826	5915	5732	5875
ClearTrip	8067	8654	6826	5778	5669	5778
Expedia	8067	8571	6826	6108	5732	6384
SOTC	7133	7133	6365	5800	3928	3948

	mean	***std dev***	***coeff var***	***max***
Yatra	6798.67	1299.03	19.11%	8654.00
MakeMyTrip	6763.83	1236.30	18.28%	8337.00
GoIbibo	7004.67	1508.53	21.54%	9353.00
ClearTrip	6795.33	1297.02	19.09%	8654.00
Expedia	6948.00	1131.68	16.29%	8571.00
SOTC	5717.83	1467.43	25.66%	7133.00

Bangalore - Bhubaneswar						
	Sept. 1 - 7	***Sept. 3 - 10***	***Sept. 5 - 12***	***Sept. 8 - 15***	***Sept. 12 - 20***	***Sept. 15 - 23***
Yatra	6289	6402	5586	5692	6189	8238
MakeMyTrip	6499	6399	5744	5324	6189	8238
GoIbibo	6289	6402	5692	6079	6189	8238
ClearTrip	6289	6402	5744	6499	6189	8238
Expedia	6424	6327	5752	5752	7348	8373
SOTC	6690	6802	5946	5946	4320	5079

	mean	***std dev***	***coeff var***	***max***
Yatra	6399.33	959.06	14.99%	8238.00
MakeMyTrip	6398.83	1002.06	15.66%	8238.00
GoIbibo	6481.50	894.38	13.80%	8238.00
ClearTrip	6560.17	862.71	13.15%	8238.00
Expedia	6662.67	1022.07	15.34%	8373.00
SOTC	5797.17	953.83	16.45%	6802.00

Bangalore - Kolkata						
	Sept. 1 - 7	***Sept. 3 - 10***	***Sept. 5 - 12***	***Sept. 8 - 15***	***Sept. 12 - 20***	***Sept. 15 - 23***
Yatra	7925	7707	5998	7007	5975	8141
MakeMyTrip	7925	7707	5998	7007	5998	8141
GoIbibo	9038	9522	8944	7055	7145	8493
ClearTrip	9039	7707	5998	7007	6863	8141
Expedia	7916	7707	5998	7055	6788	8944
SOTC	8668	10463	5978	5902	3961	6640

	mean	***std dev***	***coeff var***	***max***
Yatra	7125.50	960.99	13.49%	8141.00
MakeMyTrip	7129.33	955.52	13.40%	8141.00
GoIbibo	8366.17	1034.19	12.36%	9522.00
ClearTrip	7459.17	1069.31	14.34%	9039.00
Expedia	7401.33	1020.16	13.78%	8944.00
SOTC	6935.33	2296.29	33.11%	10463.00

[**Note:** the data for price comparisons was collected from the websites of the tourism aggregators on 25/08/2017 at about 9:00 p.m.]

Web Analytics Comparisons:

	total visitors	*average duration*	*pages per visit*	*rank*
Yatra	11.05	04:00	3.54	38
MakeMyTrip	37.59	04:46	4.38	16
GoIbibo	4.02	05:34	3.21	40
ClearTrip	17.79	03:26	4.06	30
Expedia	1.58	05:08	3.51	225
SOTC	0.23	02:27	2.23	3137
	ref: similarweb.com			

	daily unique visitors	*daily page views*	*daily income*	*web score*
Yatra	99901	184816	$ 179	61%
MakeMyTrip	207466	500362	$ 966	64%
GoIbibo	124563	230441	$ 222	51%
ClearTrip	88588	163887	$ 158	47%
Expedia	22127	40934	$ 26	24%
SOTC	8081	14949	$ 10	43%
	ref: freeseodoctor.com			

	site loading time	*score*
Yatra	8.43	70%
MakeMyTrip	4.21	84%
GoIbibo	4.97	80%
ClearTrip	3.23	81%
Expedia	7.56	69%
SOTC	84.24	57%
	ref: seositecheckup.com	

Customer Satisfaction Comparisons:

	justdial.com	*mouthshut.com*	*score*
Yatra	3.7	3.94	58%
MakeMyTrip	3.6	3.89	58%
GoIbibo	3.8	1.97	27%
ClearTrip	3.7	1.90	30%
Expedia	3.7	1.28	8%
SOTC	3.7	2.89	67%