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ABSTRACT

The advancement of Central Reservation Systems (CRSs) has provided Destination Marketing Organizations with sophisticated tools to operate effectively in today's e-tourism environment. A growing segment of eTourism sales is travel packages. To assess the effectiveness of net packaging and to identify strategic opportunities provided by data collected through the process of package sales, the Ottawa Tourism CRS system and data warehouse is explored. Trends indicate the growth in net versus phone bookings, and package versus regular bookings. These are positive trends given that packages represent longer stays and higher expenditures, aligning with strategic directions of the destination.

Keywords: *destination marketing, packaging, eTourism.*

INTRODUCTION

Information and communication technologies (ICTs) have stimulated radical change in the operation of destination marketing organizations (DMOs) as well as that of supplier organizations, namely hotels and attractions. ICTs not only provide efficient distribution channels to DMOs and suppliers, but have enabled greater connectivity between organizations than ever before. The advancements in technological capabilities have moved DMOs from being primarily marketers and information providers, to being product distributors, sellers, and revenue generators. The adoption of Central Reservation Systems (CRSs) by DMOs at national, state and local levels have provided these organizations with sophisticated tools to operate effectively in today's e-business environment.

Within the broad category of eTourism sales, a growing segment is that of travel packages. For consumers, Internet - or net - packaged-travel distribution greatly facilitates the search/compare/assemble/ and booking process. For the supplier, net packages expand market reach and have the potential to return higher profits. Still, the initial investment in both financial and human resources is significant for the average DMO, and the return can be uncertain. While there is much literature espousing the virtues of e-business systems, there is much less empirical evidence of its success, partially because of proprietary data issues.

This paper presents an analysis of a DMO, Ottawa Tourism, who successfully adopted a CRS system with advanced packaging capabilities. The extensive data base of bookings, by type, product, nights booked, and dollar amount, has been shared with university researchers in order to study the effectiveness of net packaging, and more fully understand the richness of data that is captured through the net distribution process. With the support of the DMO, Ottawa Tourism, and the CRS provider, Meridian Reservation Systems, this paper follows the evolution of a DMO

from marketer, to call centre, to booking agent, and assesses the effectiveness of the newest business model: web-based destination packaging.

LITERATURE REVIEW

Evolution of destination marketing organizations

The first organization set up specifically to provide information on a given destination dates back over 150 years ago to Switzerland (Pike, 2004), although it is in the United States that their formation took hold more formally. Founded well over 100 years ago, largely to attract conventions – and later, meetings – into communities, Convention Bureaus evolved over time into Convention and Visitor Bureaus (CVB), especially during the 1960s and 70s when travel for leisure purposes started to grow exponentially (Ford & Peeper, 2008). From the early boosterism by businesses and citizens of these communities, providing support to businesses to attract conventions and meetings, to event organizers to book venues and hotels, to the travel trade to provide local expertise, and to delegates and visitors in the form of brochures and pamphlets, quickly became the central role of CVBs. Increased competition among destinations, and increased sophistication of promotional efforts saw the concomitant evolution of these organizations into full-fledged marketing bodies or Destination Marketing Organizations (DMOs).

The recognition of the economic benefits any form of tourism can bring to a country, region or destination led to much more active participation, particularly financial, by governments the world over. In his survey of national DMOs, Pike (2004) found that about two-thirds were government ministries or departments with the remainder being separate legal entities, usually not-for-profit, but "irrespective of the size of the destination (vis-à-vis international visitor numbers), the values attached to marketing budgets are all very small when compared to the overall impact such a low spend has in the marketplace" (Middleton, Fyall, & Morgan, 2009: 339). At the regional, and particularly the local level, it is far more common to see public-private partnerships or associations whose membership is composed of private sector businesses, non-profit and public sector organizations and interests, as well as select politicians.

Fundamentally, the role of DMOs is to ensure the long-term competitiveness of the destination for which they are responsible, as measured in tourism expenditure and employment created. However, this task is extremely complex as a destination is an "amalgam of tourism products, offering an integrated experience to consumers" (Buhalis, 2000: 75), an amalgam over which the DMO in reality has little or no control. Rather, the DMO acts as a marketing facilitator, creating collaboration among suppliers and operators, leveraging funding for promotional strategies, coordinating at least somewhat the marketing efforts of the various stakeholders, and providing advice and leadership through research, market intelligence and visitor feedback. Perhaps most importantly, they also provide a vehicle to the multitude of micro, small and medium-size businesses that make up the bulk of the operators, and who would not have the financial clout or marketing expertise necessary to reach a national or international audience. Although these tasks are vital and ultimately socially and economically beneficial for the destination, the trend is towards less government involvement at this geographic level and a shift towards fees placed on visitors and private sector funding, which has forced DMOs to become increasingly commercial entities that generate revenues for their operations through membership fees, sponsorships, and sales.

Much of a DMOs strategy thus focuses on the four traditional pillars of the conceptual model – also known as the AIDA Model – for creating advertising or marketing communications messages: get the potential visitor's attention, hold his or her interest, arouse desire to visit the destination, and then obtain action. The action obtained, ideally in the form of booking, has tended to be limited to the recommendation of accommodation or the transfer to a receptive tour

operator or agency, who would handle travel arrangements. However, with the introduction of new information technologies over the past fifteen years, the business model of the DMOs has been rapidly changing.

As early as the mid-90s, researchers started to identify the potential that destination management systems (DMS) have to integrate the products and services offered within a destination, distribute the information online through a variety of channels, engage the potential visitor, and generate rich and deep data about market segments (Pollock, 1995; Buhalis, 1997; Sheldon, 1997; Frew & O'Connor, 1998; Collins & Buhalis, 2003). However, while many DMSs have been implemented, "only a very small number … have survived their development and pilot stages to become operational and offer the promised benefits" (Buhalis, 2003: 288). As recently as 2008, in its "Handbook on e-marketing for tourism destinations", the World Tourism Organization (UNWTO) and the European Travel Commission (ETC) urge destinations to work towards making all their tourism products bookable online in real time, as long as "the product range is fairly simple" (p. 130). This is the model adopted by VisitBritain where an online "shop" allows visitors to buy everything from transit passes to museum tickets, putting items into a "shopping cart", yet still without an attempt by the destination to package accommodation product and service elements.

The trend towards disintermediation

The traditional model for distributing tourism products and services, particularly in the international and longer-haul markets, has been for inbound tour operators to prepare itineraries and book ground transportation, accommodation, attractions, events and/or other elements required to create a tourism "package". Travel wholesalers created brochures featuring these packages and added transportation options for getting to the destination. Wholesalers then offered the brochure travel packages either directly to the public or by selling through travel agents. These packages made it easier and far more convenient for consumers to make their travel purchases, and both the travel agent and tour wholesaler offered additional guarantees for assistance at the destination, quality assurance for the selected suppliers, and a competitive price due to volume purchases.

The continued growth and application of information technology, and specifically DMSs, has allowed for a bridging between suppliers and consumers, a function traditionally occupied by tour operators and travel agents. The opportunity presented by technology for even small suppliers to reach out directly and communicate with consumers anywhere in the world has threatened the disintermediation of the distribution channel (Buhalis, 2003). At the same time, consumers are increasingly comfortable researching among a bewildering choice of options for every component of the holiday, and booking directly with suppliers as online payment options become more secure. As a result, online travel revenues exceeded offline revenues for the first time in 2008 in the US (ETC, 2010).

To deal with the enormous amount of information needed and generated by the growth of air travel, the first fully functional computer reservation system (CRS) was introduced by American Airlines and IBM under the name "SABRE" (Semi-Automated Business Research Environment) in 1963/64 (Pease, Rowe, & Cooper, 2007). As other airlines introduced their own CRSs, it became imperative that travel intermediaries, such as travel agents, be able to access more than one system, while at the same time accessing destination, product and service information. The continual merger of various CRSs led to the first global distribution system (GDS), and when SABRE expanded to travel agents in 1976, GDSs truly became the "circulation system of the tourism product in the international market" (Buhalis, 2003: 94).

Today, there are four main GDSs in existence: Amadeus, Sabre, Galileo, and Worldspan although the latter two are both owned by Travelport. Each of these has set up its own Web site linked to their databases (Zhou, 2004), and through multiple channels from airline, hotel and car rental partner websites to eTourism intermediaries, travel search engines and destinations, consumers are able to compare information, create itineraries and book many aspects of their trip themselves. With Microsoft's launch of Expedia in 1995, followed by Sabre's launch of Travelocity in 1996, the intermediation of travel product was radically and irreversibly changed.

Today, approximately 80% of North Americans are online (Tourism Industry Association of America, 2009). The use of the Internet crosses all demographics, and has become the preferred method for travel planning purposes. Thus, hospitality e-commerce and IT services have become a decisive element for an organization to stay competitive (Yeh, Leong, Hu & Tsai, 2004), and a major factor in the operation of hospitality businesses (Olsen & Connolly, 2000). Into this fierce and radically different world of tourism product and service distribution, DMOs are starting to dip a cautious toe by selling more product, and packages, directly to consumers.

The need to re-intermediate and the role of DMOs

Since the 1990s, middle agencies have been pushed out as suppliers used online e-sales to connect directly with consumers. The result was a proliferation of online travel information, reviews, images, services and products, making the purchasing process *more* complex for consumers, despite the facilitating e-environment that was envisioned. In response, the market correction was a shift toward more online packaging, and DMOs have entered as an important intermediary in this new phase of eTourism delivery. This is a new role for DMOs, and one that is making travel operators and wholesalers, the traditional packaging experts of the sector, nervous.

DMSs enable DMOs to have an active sales role, more so than in the past. It is a role that appeals to potential travelers who gravitate to destination-based packaging sites that match their search behaviour; and one that industry "members" also seem to appreciate. Fees exist, but are perceived by both industry and consumer as less costly when managed by a quasi-public DMO body versus a private sector business; perhaps seen more as a type of operating or member cost, versus an incremental service fee. System investment, too, can be cost prohibitive, but now third party providers offer DMOs systems on a commission basis, so that DMOs do not incur heavy IT costs. Yet, they can benefit from potential revenue streams, *and* provide service to members, including smaller accommodation properties and attractions that can now be a part of the e-game without significant upfront investment in IT.

While CRS adoption has spread, a major technological driver for change is data warehousing and data mining (Olsen & Connolly, 2000), yet this valuable outcome of system integration is often underutilized. Customer relationship management, long recognized as a strategic marketing approach, relies heavily on the collection and analysis of customer information to refine offerings (Sigala, 2005). Information has become a strategic resource that can be used to seek a competitive advantage (Camison, 2000).

Increasingly, potential travelers familiar with searching and booking capabilities are looking for dynamic packaging capabilities (Buhalis & Law, 2008). The concept of dynamic packaging is the bundling of components selected by a traveler to produce one reservation (Cardoso & Lange, 2009). While dynamic packaging has great customer appeal, and has been implemented by the major online travel agencies (e.g. Expedia, Travelocity and Orbitz), its strategic impact and opportunities have not been investigated (Cardoso & Lange, 2009).

STUDY BACKGROUND

To assess the effectiveness of online packaging and to identify strategic opportunities

provided by the data collected through the process of package sales, the Ottawa Tourism CRS system and data warehouse is explored.

Who is Ottawa Tourism?

Established in 1971, Ottawa Tourism is a not-for-profit membership based DMO, with 350 tourism-related business members. Working collectively to profile and promote Ottawa as a diverse and exciting place to visit, Ottawa Tourism's objectives are threefold: to promote the destination; increase visitation; and, enhance economic impact for the industry and its membership. Governed by a Board of Directors who set policies and guidelines for the organization's financial approach and strategic direction, Ottawa Tourism has been funded primarily by a Destination Marketing Fund as well as partnerships with stakeholders (such as hotels and attractions). Ottawa Tourism is a multi-faceted DMO, focused primarily on destination marketing.

Recently, Ottawa Tourism reaffirmed its brand, emphasizing four brand pillars that define its key attributes as a visitor destination – Capital (city of Canada), Culture, Nature, and Relaxed Urban Vibe -- to promote their destination. Dedicated to helping all members reach their financial goals, Ottawa Tourism works closely with hospitality and tourism organizations to profile the destination and in turn, improve business for members.

Like many DMOs in North America, Ottawa Tourism struggles with fluctuating budgets, changing media environments and market fragmentation. This combined with a growing demand to improve online bookings, Ottawa Tourism decided to invest in their own eTourism platform, to improve online bookings and the overall consumer experience. They began their online presence in the late 90s with the creation of a first generation web site featuring static travel-related information. Online bookings were introduced in 2003, enabling potential travelers to book their trips directly through an individual hotel and pay online, and thereby competing with larger international travel sites within the growing context of online travel. Offering information, pictures and packages for the individual hotels in Ottawa Tourism's database, the service was on par with the competition. In time, however, the processing system was surpassed by the more advanced eTourism designs of travel giants like Expedia, Travelocity, Hotels.com, and others. Without the ability to spend massive amounts of money on advertising and promotion like their competitors, Ottawa Tourism took a hard look at their own eTourism designs in order to improve their effectiveness.

It was the lack of a universal searching mechanism which was arguably most limiting. While sites like Expedia allow the customer to search for all of the properties in one destination area simultaneously, Ottawa's old system required consumers to search for rooms on a property by property basis. Further, while more user-friendly reservation systems are designed to include no more than four different Web pages to book a vacation (for example: personal input, results, booking information, and confirmation), with the old system, the customer was often required to navigate through up to eight pages.

By 2006, approximately 55 percent of Ottawa's customers were still making reservations by telephone. While the information was there, the online interface did not seem to instill trust in consumers to book online, and as a result Ottawa Tourism was not taking full advantage of online capabilities. Following an extensive review of system needs, Ottawa Tourism adopted a new reservation system: a rising DMS from Niagara Falls called Meridian Reservation Systems.

Meridian Reservation Systems

Founded in 1998 and based out of Niagara Falls, Canada, Meridian Reservation Systems is the current DMS for Ottawa Tourism. Originally created as the reservation system for one

small Niagara Falls motel, Meridian was a simple processing system to keep track and control of pricing, reservation, and booking information. Yet with its flexible design and ability to cater to a business's booking and marketing needs, the application potential was much bigger than its original purpose. Created before internet marketing had become a major media for tourism, Meridian was able to adapt the system to e-marketing trends. From a processing system designed for one single property, to an international DMS provider, Meridian systems now support Ontario's major destinations, including Niagara Falls, Toronto, Ottawa, and Hamilton.

Ottawa Tourism introduced the Meridian Reservation System in April of 2008, shedding many of its former e-marketing inefficiencies, and taking a decidedly cutting-edge approach to marketing their product. Featuring an interface that can be manipulated by each individual hotel, Meridian Reservation Systems has not only proven user friendly and visually attractive, but its flexible back-end, and versatile reservation system has allowed for greatly improved data warehousing.

Meridian's destination-driven packaging engine has enabled Ottawa Tourism to create, manage, promote and sell dynamic packages to a range of target audiences. Packages are themed according to Ottawa's brand pillars, and featured on the DMO's website. Consumers select a package, a travel date, and party size, the system checks the request against availability, and provides the consumer with accommodation options and pricing information. Once transactions are complete, the information is captured and stored, and the effectiveness of the package offerings can be assessed.

RESULTS AND DISCUSSION

Two years of booking data, from April 2008 to March 2010, comprising over 13,000 individual bookings worth approximately $4.3 million in revenues were mined to evaluate packaging effectiveness, and to assess the integrative process of data analysis into strategic marketing.

Table 1 presents a summary of two year's of booking data, comparing Web and phone bookings for regular accommodation-only bookings, and for package bookings. In all, 11 packages were offered over this time. The five year-round packages were: Cultural Odyssey, Family Discovery, Rendez-Vous for Two, Sip, Savour & Spa, and the Urban Adventure package. Seasonal package offers were: Tulip Celebration, Fall Urban Adventure, Winter Family Getaway and Winter Rendezvous for Two. Additionally, three new packages were offered in 2009: Casino Getaway, Celebration Vacation and Girlfriends Getaway, for a total of 12 packages included in Table 1. While the year-round Cultural Odyssey, Family Discovery and Rendez-Vous for Two packages are the most popular offers, the Fall Urban Adventure has shown significant growth, and the seasonal Tulip Celebration remains popular.

Table 1
Ottawa Tourism Report by Type of Booking, April 2008 to March 2010

| Type of Booking | Web Bookings | | | | Phone Bookings | | | |
| | 2008/09 | | 2009/10 | | 2008/09 | | 2009/10 | |
	No.	%	No.	%	No.	%	No.	%
Accommodation Only	3,633	74.0%	3,416	64.1%	680	58.0%	712	44.2%
Package Bookings								
Cultural Odyssey	515	10.5%	346	6.5%	155	13.2%	164	10.2%
Fall Urban Adventure	11	0.2%	31	0.6%	5	0.4%	22	1.4%
Family Discovery	303	6.2%	697	13.1%	90	7.7%	333	20.7%
Rendez-Vous for Two	75	1.5%	263	4.9%	25	2.1%	138	8.6%
Sip, Savour & Spa	32	0.3%	15	0.3%	23	2.0%	10	0.6%
Tulip Celebration	136	2.8%	149	2.8%	65	5.6%	75	4.7%
Urban Adventure	15	0.3%	34	0.6%	10	0.9%	17	1.1%
Winter Family Getaway	75	1.5%	77	1.4%	51	4.4%	29	1.8%
Winter Rendezvous for 2	115	2.4%	116	2.2%	68	5.8%	33	2.1%
Casino Getaway	1	0.0%	48	0.9%	0	0.0%	22	1.1%
Celebration Vacation			77	1.4%			34	2.1%
Girlfriends Getaway			61	1.1%			27	1.7%
Sub Total Packages[1]	1,278	26.0%	1,914	35.9%	492	42.0%	899	55.8%
Grand Total Bookings	4,911	100%	5,330	100%	1172	100%	1,611	100%

[1]Numbers may not be exact due to one package that was miscoded as Accommodation Only.

An analysis of bookings by type shows the decrease in the share of Accommodation Only bookings by both Web (from 74% in 2008/09 to 64% in 2009/10) and Phone (from 58% in 2008/09 to 44% in 2009/10), as the share of Package bookings by both Web (from 26% in 2008/09 to 42% in 2009/10) and Phone (from 36% in 2008/09 to 56% in 2009/10) has increased significantly. The rapid growth in package bookings, a 61% increase from 2008 to 2009, helped boost Ottawa Tourism's overall CRS sales in a year that was economically challenging for travel.

The significant difference in the rate of growth between Accommodation Only and Package Bookings is even more evident when the number of Nights Booked and the Dollar Amount of Bookings are compared, in Table 2. Accommodation Only Nights Booked decreased 5% from 2008/09 to 2009/10, and in terms of revenues, the Accommodations Only bookings decreased by 13%. On the other hand, Nights Booked for packages increased 65.7% and Amount of Bookings for Packages increased by 44%. Again, the Grand Total of all bookings saw an increase in 2009 largely due to the growth in package sales.

Table 2
Ottawa Tourism Report by Nights and Amount Booked, April 2008 to March 2010

Type of Booking	Nights Booked			Amount Booked		
	2008/09	2009/10	% Change '08/9-'09/10	2008/09	2009/10	% Change '08/9 – '09/10
Accommodation Only	9,414	8,943	-5.0%	$1,445,288	$1,257,767	-13.0%
Package Bookings						
Cultural Odyssey	1,802	1,377	-23.6%	$259,547	$165,686	-36.2%
Fall Urban Adventure	38	125	229.0%	$5,352	$15,269	185.3%
Family Discovery	1,022	2,754	169.5%	$150,448	$372,891	147.9%
Rendez-Vous for Two	238	1,073	350.8%	$34,870	$127,660	266.1%
Sip, Savour & Spa	147	55	-62.6%	$21,863	$7,601	-65.2%
Tulip Celebration	440	538	22.3%	$67,833	$73,188	7.9%
Urban Adventure	74	143	93.2%	$10,880	$17,057	56.8%
Winter Family Getaway	287	252	-12.2%	$46,530	$37,799	-18.8%
Winter Rendezvous for 2	398	359	-9.8%	$60,662	$47,051	-22.4%
Casino Getaway	3	174		$422	$22,495	
Celebration Vacation		289			$34,142	
Girlfriends Getaway		233			$28,216	
Sub Total Packages[1]	4,449	7,372	65.7%	$658,406	$949,056	44.1%
Grand Total Bookings	13,863	16,315	17.7%	$2,103,694	$2,206,823	4.9%

[1]Numbers may not be exact due to one package that was miscoded as Accommodation Only.

While accommodation only bookings still outnumber package bookings (60% and 40%, respectively), packages continue to gain a sizable share of bookings. Most impressively, in terms of performance, packages represent longer stays (2.6 nights versus 2.2 nights) and higher expenditure amounts per booking ($337 versus $305) than regular accommodation only bookings. These increases represent a 20% longer stay and an 11% greater expenditure for booked packages, substantiating the strategic move to destination-based travel packaging, enabled by CRS and DMS capabilities.

While the eTourism platform has contributed to this success, other factors have as well. At the local, provincial and national DMO level, there has been a shift from traditional media to online media and search engine marketing (SEM). In 2009, the Canadian Tourism Commission invested $10 million in advertising in the Canadian market, driving visitation to the DMO websites, with a strong emphasis on packaging. Ottawa Tourism's appealing online offers benefited from this strategy. While the importance of accommodation only bookings will continue, the growth in package sales is clearly a lucrative trend for destinations.

CONCLUSION

Since the implementation of the Meridian System, Ottawa Tourism has seen a significant return on their initial investment, and all signs point towards a continuation of the growth in online bookings. Packages present great opportunity for increased revenue, as well as adding value for the consumer. To support strategic marketing decisions, the warehouse of booking data has been mined to produce reports by sales type, package bookings, accommodation only bookings, nights and amounts of bookings to illustrate not only an important trend toward e-packaging, but also the type of analysis that can be mined from CRS data bases. More

specifically, Ottawa Tourism is refining its integration of data analysis in support of strategic business decisions, particularly of marketing directions. Their experience in building a successful eTourism platform featuring destination-based packaging is shared as a best practice to help inform other DMOs considering a similar evolution.

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