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Digital Tourism Marketing Channels: A Post-Covid Comparative Analysis of Consumers' Preferences

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***Abstract* — The following article examines the post-Covid digital transformation in tourism distribution channels. Its focus is on the shift in consumers' preferences when choosing and booking a trip, because of the integration of technological innovations. The analysis includes the questions: where do consumers acquire information about the tourism products offers when choosing a destination, an accommodation and a transport mean before and after the pandemic; what are their motives for choosing a tourism product; what are the main characteristics (geographic, demographic, socio-economic, geodemographic and psychographic) of consumers that influence the decision to reserve a tourism product and how do they carry out the process of booking tourism products after the Covid-19 pandemic. Scientific research in the field of e-commerce and in tourism marketing channels over the last three years has been focused either on digital transformations in the industry or on the shift in consumers` preferences after the Covid-19 pandemic. However, there is a lack of in-depth scientific research on the post-Covid digital transformation of tourism marketing channels in Bulgaria. The significance of the topic for the EU tourism policy, for the Bulgarian tourism sector and for local authorities and destination management organizations and the gap in research on the changes in consumer preferences after the pandemic in Bulgaria gave me a reason to focus on this study.**

Keywords —channels, consumers, digital, marketing.

I. Introduction

Tourism contributes significantly to European economic growth and is in the focus of several European, national and local policies. That can be explained due to its cross-sectoral economic and social dimensions and the high share of micro, small and medium-sized enterprises operating in the sector. According to the World Tourism Organization`s data, the industry generated 10% of the EU's GDP and provided around 23 million job positions in 2019. During the Covid-19 pandemic, tourism was one of the most affected sectors, because of the travel restrictions, airlines worldwide grounded their planes, while hotels, restaurants, and tourist attractions remained closed. The result was unprecedented losses (80% drop) in terms of revenue and jobs (11 million jobs) according to EC data [1].

The digitalisation of tourism marketing channels reflects changes in consumer behaviour, technological innovation and the opportunities they provide for recovery of the industry after the pandemic. Primary, digital marketing [2] channels enable tourism providers to attract consumers by creating positive image in social media, the main source for recovery [3], via influencers` recommendations, travel bloggers` feedback, customers` generated content in social media, online shared feedback (Google Local Guides, websites` users feedback, social media feedback). Social media is probably the most powerful and effective channel for tourism promotional and communication [4] channel.

Even before the COVID-19 pandemic tourism services providers put their focus on the online distribution channels and promotions [5]. But because of the travel restrictions and the lower demand that trend tent to become a key marketing tool [3] for overcoming those challenges during the pandemic [6]. So that at the post-Covid period online bookings of tourism products remain one of the main channels for reservation, chosen by the tourists, and a main source of income for the services providers. Along with that consumers` willingness to travel was also boosted by the augmented and virtual reality integrated on the tourism services providers` websites or social media channels; the easy and fast access to reliable information about destinations, transport means, accommodation and other

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tourism services; and the flexibility of prices and dates available online, as most of the services providers rely on direct sales after the pandemic [2]. Digital marketing channels have made the booking process more customer-friendly, as tourists have 24/7 access to reservation systems from the convenience of their home or at any other location. They can easily and at no cost switch between various booking options and channels, supported by chatbots during the process.

The relevance of the topic is justified primarily by the fact that EC adopts several strategic documents, such as European Agenda for Tourism 2030, Transition Pathway for Tourism, Europe's Digital Decade, that emphasize the importance of digital innovation in tourism for building a crisis-resistant ecosystem. Furthermore, the industry recovery after COVID-19 pandemic has been boosted by the digitalization because of the tourists` changing requirements.

Scientific research in tourism marketing channels over the last three years have been focused either on digital transformations in the industry and shifts in consumer behaviour on one hand, or on the strategies that companies adopt to overcome the negative impacts of the Covid-19 pandemic at the other. However, in-depth scientific research on the post-Covid digital transformation of tourism marketing channels in Bulgaria can hardly be found. The significance of the topic for EU tourism policy, for Bulgarian tourism sector and for local authorities and destination management organizations gave me reason to focus on this study.

II. Materials and Methods

The subject of the study is the post-Covid shift in tourism product consumers` buying patterns. So that the object of the study is the tourism product consumer. For the purpose of the research qualitative data has been gathered for investigating consumers` behaviour. The qualitative research is more flexible and concentrated, prioritizing the quality and the depth of the collected data [7]. It samples specific groups and gathers meaningful data. So qualitative research has been chosen for the current study. The results of the qualitative research are developed under the statistical analysis which links what is known and what has been learned through the research. An online questionnaire was developed, and an anonymous survey was implemented to collect primary data. That method has been chosen because it is efficient, quick and not expensive, which makes the process of data collection faster and cost effective [8]. The online survey in fact is not a pure representative of the survey method, because some of its forms have specific features of the interview method (for example, the strict sequence in asking and answering the questions included in the relevant questionnaire). An important characteristic feature of the online survey is that the relationship and information exchange between surveyors and respondents are also an object of the digital transformation. The online survey has a higher degree of "perceived confidentiality" than other forms of data collection and higher "speed of fieldwork" [9]. However, the second indicator is an advantage of the online survey only in relation to other survey methods. Another advantage of the method under consideration over the other types of surveys is the low costs of its implementation [10].

In that regard, two online surveys were conducted. The first one illustrates consumers` booking patterns during the pandemic. Its timeframe is October-November 2021. A thousand respondents were selected by non-probability sampling procedure. Their demographic characteristics are diverse: women are 57,3% and 42,7% are men, divided into four age groups – 18-29 years old (16,3%), 30-39 years old (30,3%), 40-49 years old (32%) and 50-65 years old (21,4%). The post Covid online survey which was carried out in October-November 2024 and then a non-probability sampling procedure was applied among 1,000 consumers of tourism products 59,4% of who are women and 40,6% men. Respondents are distributed as follows: 18-29 years old – 17,1%, 30-39 years old 29%, 40-49 years old – 30,7%, and 50-66 years old – 23,2%. The logic and technology of the study include comparative analysis of the model of consumer behaviour when choosing and booking tourism products during and after the global pandemic. When processing quantitative data in the current article descriptive statistics and comparative analysis were envisaged while for further studies correlation analysis and regression analysis will be explored for answering the questions whether younger generations are more influenced by social media or whether the older generations rely more on the recommendations of friends and relatives or traditional media and channels. The correlation analysis will also be focused on answering the question whether there is a difference between men and women reliance on online search.

III. Results and Discussions

The first research question was "How do you prefer to book tourism products during/post Covid-19 pandemic?" and five options to choose between were given. As was expected, there is a significant drop in the number of respondents who didn't travel in 2021, as they were 24.2% and in 2024 that number decreased by 21%, as only 3% of the respondents didn`t travel. That could be explained with the pandemic travel restriction in 2020-2021 and the consumers` health concerns.

Table 1 Consumers` Preferences for Tourism Distribution Channels

How do you book tourism products during/post Covid-19 pandemic?	**Comparison**		
	2021 (during)	***2024 (post)***	***Change***
Websites for reservation	36.2%	44.1%	7.9%
Directly through tourism services providers	26.2%	38.3%	12.1%
Through travel agency	12.4%	13.8%	1.4%
I don`t travel	24.2%	3%	-21%
Other	1%	0.8%	-0.2%

As was expected, there is a significant drop in the number of respondents who didn't travel in 2021, as they were 24.2% and in 2024 that number decreased by 21%, as only 3% of the respondents didn`t travel. That could be explained with the pandemic travel restriction in 2020-2021, the consumers` health concerns and the uncertainty due to Covid-19. Data shows that the most preferable booking channel during and post Covid-19 pandemic were the websites for reservation. 36.2% of tourists chose that channel and in 2024 an increase of 7.9% of those who preferred the websites for reservations has been registered as their number reached 441 out of 1 000. Furthermore, the highest increase (12.1%) was registered in those who book directly through tourism service providers from 26.2% in 2021 to 38.3% in 2024. Tourists who booked through travel agent were 12.4% of the respondents in 2021 and their number rose by 1.4% to reach 13.8 percent in 2024. 1% of the surveyed chose other booking channel in 2021 and 0.8% of the surveyed did the same in 2024.

When asked to specify up to 3 concreate channels used by the tourists to gather information about different components of the tourism trip the respondents in 2021 rated the channels as follows: (1) Independent online search – 69.9%, (2) Friends and relatives' recommendations – 61.7%, (3) Social media – 48.3%, (4) Tourism services providers` websites – 25.8%, (5) Travel agencies` websites – 18.1%, (6) Travel agencies` catalogues and printed advertising materials – 16.3%, (7) Tourism services providers` advertising materials – 13.6%, (8) Other – 0.8%.

TABLE 2 CONSUMERS` PREFERENCES FOR MARKETING CHANNELS FOR GATHERING INFORMATION

Marketing channel	Comparison		
	2021	*2024*	*Change*
Independent online search	69.9%	62.2%	- 7.7%
Friends and relatives' recommendations	61.7%	41.4%	- 20.3%
Social media	48.3%	59.1%	10.8%
Tourism services providers` websites	25.8%	28.3%	2.5%
Travel agencies` websites	18,1%	21.1%	3%
Travel agencies` catalogues and printed advertising materials	16.3%	15.7%	- 0.6%
Tourism services providers` advertising materials	13.6%	12.8%	- 0.8%
Other	0.8%	0.9%	0.1%

The results of the survey in 2021 show that the highest percentage of respondents (69.9%) gather information independently online, using Google and various types of websites/travel blogs – Booking, Trivago. Recommendations from friends/relatives were ranked as the second most powerful promotion channel when choosing tourism products with 61.7%. In third place respondents put social media (48.3%). Direct search at tourism services providers` websites acquired 25.8% of consumers followed by the online channels of travel agency (18.1%). Aligned with the global trends lower percentage of respondents use catalogues and printed advertising materials of travel agencies for information when choosing tourism products – 16.3%, followed by 13.6% of respondents who use catalogues and advertising materials of hoteliers/transport companies and 0/8% chose other channels, not listed above.

The ratio between the above channels illustrates that post Covid-19 pandemic consumers` preferences are mainly for digital channels when gathering information for future travel and the online channels play a powerful role when choosing tourism products, as the results of the consumers` survey in 2024 are the following: (1) Independent online search – 62.2%, (2) Social media – 59.1%, (3) Friends and relatives' recommendations – 41.4%, (4) Tourism services providers` websites – 28.3%, (5) Travel agencies` websites – 21.1%, (6) Travel agencies` catalogues and printed advertising materials – 15.7%, (7) Tourism services providers` advertising materials – 12.8%, (8) Other – 0.9%.

Data proves that after the pandemic consumers moved to more digitalized channels when they choose tourism products with the social media channels becoming more influential for the tourists` behaviour. That can be explained with all the options provided by digital marketing channels for comparing products, prices, tourism packages, the variety of promotions and deals online, the accessibility of the information (24/7 at any location), the feedback provided online and the influencers` recommendations reshaping consumers` preferences.

Tourism products consumers` buying patterns are associated with the booking process. In 2021 during the Covid-19 pandemic 85.4% of tourists chose websites or mobile apps for reservations, such as Booking, Esky, Trivago, for their bookings. That percentage increased to 91% in 2024 which makes the websites for reservations the main distribution channel for tourism products. The second-place ranked booking channel are the websites and mobile apps of the tourism services providers – 45.3% of the respondents preferred that channel in 2021 which is 12.1% lower than the percentage of those who booked through the same channel in 2024 (57.4%). Tourists who made their reservations through websites or mobile apps of travel agencies represent 38% of the surveyed in 2021 which had 3.4% increase in similar bookings in 2024 (preferred by 41.4% of the respondents). In contrast 19.4% of tourism products consumers preferred to reserve such services at travel agents` offices in 2021. Their number decreased in the following years to reach 14.7% in 2024. Those who didn't choose digital channels in 2021, booked on the phone call with a tourism services supplier or a tourism agent, were respectively 17.6% and 14.6%.

The data in Table 3 can be related to the digital marketing channels preferred by the respondents to choose tourism products. Consumers had the opportunity to search tourism offers online and compare tourism products elements, prices and promotions, afterwards tourists can easily contact the selected providers and reserve by phone call.

As a consequence of the pandemic there was higher uncertainty related to travel and that can explain why consumers preferred more personal customer service because it provides higher security and reliability of the reservation. In the next 3 years due to the higher extent of digitalization of the tourism marketing channels, such as virtual and augmented reality, contactless check-in and checkout processes and the chatbot options integrated on the companies` websites or mobile apps led to decrease in the number of tourists who book tourism products on the phone. In 2024 13.2% and 11.7% respectively reserved their trip on phone call with a service provider or a travel agency. The less preferable distribution channels are the offices of the tourism products providers. They accounted for 7.5% in 2021 and 6.9% in 2024. That can be easily explained by the nature of tourism as is related to the movement of people from their usual environment. So, it is the territorial distance between tourism services providers and the consumers that makes the direct offices bookings less accessible for the consumers.

Analysing the data of the surveys, some general trends related to the reservation process of tourism products can be highlighted. The respondents were asked how they prefer to book tourism products and multiple answers were accepted. In that regard an accumulative percentage of 72 tourists preferred indirect distribution channels and chose tourism agencies` services, compared to 155.8% who reserved their travel on their own in 2021. That trend was stable in the next few years and in 2024 travel agents were even less preferable, as they gain 67.8% of consumers` preferences which is a 5.8% decrease. In contrast there was a 12.7% increase of the tourists who organized their travel individually in 2024 – gaining 168.5% of the multiple answers. After the pandemic tourism consumers prefer to book different components of their travel by themselves, although travel agencies still acquire a significant percentage of the reservations, they tend to be a less preferable distribution channel.

TABLE 3 CONSUMERS` PREFERENCES FOR TOURISM DISTRIBUTION CHANNEL

Consumers` preferences for tourism distribution channels	**Comparison**		
	2021	***2024***	***Change***
Platform for reservations (Booking, Esky, Trivago)	62,5%	63.8%	1.3%
Mobile app for reservations	22,9%	27.2%	4.3%
Tourism services providers` website	31,3%	38%	6.7%
Tourism services provider`s mobile app	14%	19.4%	5.4%
On phone calls with a hotelier or a transport company	17,6%	13.2%	-4.4%
At tourism services providers` offices	7,5%	6.9%	- 0.6%
Travel agent website	30%	33.7%	3.7%
Travel agent`s mobile app	8%	7.7%	- 0.3
At tourism agencies` offices	19,4%	14.7%	- 4.7%
On phone call with travel agent	14,6%	11.7%	- 2.9%

Furthermore, the data can be arranged according to consumers` preferences for direct and indirect distribution channels. The ratio illustrates that indirect booking channels are twice preferable by the consumers than direct reservation channels. Along with that it can be concluded that websites, as a reservation channel, are three times preferable than the mobile apps of the same organisations. Traditional distribution channels in tourism are rarely preferable by the consumers and the percentage of those willing to choose them for reservation is decreasing in the years after the pandemic.

Considering consumers` preferences for marketing channels when choosing and booking tourism products the platforms for reservation can be accepted for the most powerful channel for increasing sales for the Bulgarian tourism market. Because of that the current study identifies the most preferable platforms used by the tourist.

Table 4 illustrates that Booking.com is the most preferable reservation channel among the Bulgarian tourism products consumers. It acquires almost 60% of the preferences while all the other options gain less than 40%. Tourists ranked global platforms for reservations on the first three places – 1) Booking, 2) Airbnb and 3) Trivago. Consumers` preferences for those channels registered a slight increase during the studied period. In 2021 Esky is ranked on the fourth place but fell one position to number five in 2024. Esky is the only one platform which is specialized in offering airplane tickets while all the others are used for accommodation bookings. In 2021 the website for discounts and offers Grabo was ranked at fifth place but in 2024 it gained 1.3% more of the consumers` preferences and went ahead Esky. Pochivka.bg is a Bulgarian website offering accommodation services primary by citizens, apart hotels or guest houses (micro and small tourism services providers). While in 2021 6% of the respondents didn`t use platforms for reservations, in 2024 that percentage decreased to 4.4%.

TABLE 4 PLATFORMS FOR RESERVATION

Most preferable platforms for booking tourism products	**Comparison**	
	2021	***2024***
Booking	58,4%	59.1%
Airbnb	16,7%	17.2%
Trivago	6,8%	7.4%
Esky	6,1%	4.2%
Grabo	3,8%	5.1%
Pochvka.bg	1,2%	1.9%
Other	1,0%	0.7%
I don`t use platforms for reservations	6,0%	4.4%

In both surveys tourism products consumers were asked about their own perceptions related to the impact of Covid-19 pandemic on the digitalization of the tourism industry. In 2021 84.3% of the respondents considered that digital transformation in tourism was fastened during the pandemic, as 23.6% of the tourists completely agreed and 60.7% agreed. In contrast 11.8% disagreed and 3.9% completely disagreed. As a comparison in 2024 the respondents who thought that Covid-19 pandemic made tourism industry more digitalized were 92.4%, with 38.9% completely agreed which is a significant raise (15.3%), 53.5% agreed while those who disagreed were 6.4% and 1.2% completely disagreed with the above statement.

Bulgarian consumers of tourism products have increased their thrust into online reservation. Only 21% prefer to book on the phone or at tourism companies` offices because of lack of thrust into digital channels (7% completely agreed and 14% agreed). While in 2021 the percentage of those who didn`t thrust, online reservation was 30.8% – with 8.8% completely agreed and 22% agreed. The increased thrust can be seen into the raise of those who completely don`t agreed with the statement by 6.4%, as seen below in Table 5.

IV. Conclusions

Bulgarian economy faces several challenges related to the inflation rate, low income, poor infrastructure, lack of digital innovation and high dependence of certain sectors one of which is tourism. While being a main source of employment and income tourism sector in Bulgaria suffers to align tourism offers with consumers` preferences in an effective manner. So that what is important is how the pandemic changed the buying behaviour as it contributed for the technology adoption in Bulgaria. Namely, Covid-19 pandemic fostered the digitalization in tourism industry, as it did in many other industries across the country. Consumers constantly moved towards digital booking channels as it can be seen by the above analysis but the tourism services providers fall behind adopting technological advancements because of lack of finance and digital innovation capacity. The findings of the study have the potential to enable tourism services providers to concentrate their efforts on certain communication and reservation channels while minimizing their cost and maximizing the profits by adequate price policy and higher compliance with the consumers` preferences.

Table 5 Consumers Thrust into Online Reservations

I don`t thrust online reservations and I prefer to book on the phone or at tourism companies` offices	**Distribution of respondents**			
	Completely agree	***Agree***	***Disagree***	***Completely disagree***
2021	8.8%	22%	40.9%	28.3%
2024	7%	14%	44.3%	34.7%

Bulgarian tourism supply must embrace technological advancement as there is a permanent shift towards online channels. Covid-19 pandemic fastened digital transformation of Bulgarian tourism industry by reshaping consumers` preferences. The comparative analysis shows that tourists are more willing to choose and book tourism products on their own through digital marketing channels. Another trend is that indirect bookings are far preferable than direct ones. Online reservation platforms are the most preferable marketing channel for Bulgarian tourist with Booking being the most favourable channel.

It can be assumed that services providers need to consider and benefit by offering their products at online platforms because of their wider reach and lower costs. Along with that they have to contact promotional offers (Grabo) and national reservation platforms (Pochivka.bg) to address consumers preferences.

While online indirect channels are main booking channel, there are still consumers who do not prefer to book through digital channels, so that services providers must invest and continue to operate traditional distribution channels.

Tourism services providers will more effectively reach their customers if using social media (Facebook and Instagram) for influencing and inspiring their travel behaviour. Along with that sufficient amount and efforts need to be put in SEO optimization of tourism suppliers own websites, content creation, Google and Meta Ads.

One of the limitations of the current study is the lack of theoretical framework. It will be overcome by future study by implementing Technology Acceptance Model (TAM) for understanding tourism consumers` motivation and their trust in digital marketing channels.

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