Exploring the Impact of E-Marketplaces on Egyptian Tourism Intermediaries

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Abstract

More people are globally becoming attracted to buying and selling products and services via the internet as the Internet is offering a vast opportunity and an easy way to book packages, search for information and get reviews about services through Customer Generated Content (CGC). It is claimed that both suppliers and consumers are working to push the intermediaries out of the value chain; in order to reduce the costs. The Egyptian tourism market is based on the relation between the three main partners in the supply chain: service providers "upstream partners", tourism intermediaries "downstream partners" and customers. Tourism intermediaries, symbolized in tour operators and travel agencies in Egypt, represent the main partners responsible for marketing and distributing the tourism services. Thereupon, it was of great importance to analyze the current and future situation of those intermediaries, especially in the massive changes resulted from the emergence of the e-marketplaces in the Egyptian tourism market. The study aims at answering some research questions in order to decide which scenario will take place for Egyptian tourism intermediaries amidst the new changes: Disintermediation**,** Re-intermediations or Cybermediation.

A qualitative research approach was used to answer the research questions. In- depth interviews with Egyptian Tourism Intermediaries, represented in traditional Travel Agents (TAs) in Egypt, Egyptian Online TAs (OTAs) and Egyptian Facebook Travel Agencies were conducted to explore the effect of the e-marketplaces on their work.

The results showed that the Egyptian intermediaries were greatly affected by the emergence of e-marketplaces and are taking serious steps to counteract the disintermediation effect to reintermediate in the market. This was accomplished by introducing innovative products, forming alliances, offering niche products and adopting price differentiation strategies. The study also provides recommendations for stakeholders in the tourism industry to help them in persisting within the changes of e-marketplaces.

Keywords: Cybermediation, Disintermediation, E-marketplaces, Intermediaries, Travel Agencies, Value Chain

Introduction

Tourism industry was from the earliest industries that started to use information technology in their work especially in the airline industry. In the late 1960s, the tourism industry started to make steady steps towards the era of technology, whether through Computer Reservation Systems (CRSs) or Global Distribution Systems (GDSs) and the Web-based application service which appeared at a subsequent stage (Syratt and Archer, 2003; Law et al., 2009 and Werthner et al., 2015).

Information technology (IT) and Information Communication Technology (ICT) play an important role for all the parties in the tourism market: National Tourism Organizations, tourism destinations, service providers, as well as tourism "intermediaries" and consumers. In fact, IT resulted in innovating new ways and methods of conducting tourism business, such as the Electronic Commerce and Electronic marketplaces. The market structure also was affected and that has led to the change in the value chain (Giaglis et al., 1999; Neuhofer et al., 2015 and Del Chiappa and Zara, 2015).

On the other hand, it has been argued that many travelers use the internet whether before or during or after their trip (Neuhofer et al., 2015 and Eriksson, 2015). The total bookings made directly via operator websites went from 67% in 2017 to 79% in 2018, while the percentage of total bookings going to online marketplaces increased from 3.2% to 9.1% (Trekksoft, 2018).

Certainly, this verifies that travel and tourism industry is moving towards wider opportunities for direct interactions between producers and consumers. This will definitely lead to a gradual elimination of “intermediaries” from the value system as well as a new rearrangement of profit in the value system as suppliers will direct part of their savings to reduce the prices to the customers (Giaglis et al., 1999 and Bogdanovych et al., 2006).

Accordingly, there are three possible scenarios that may take place: disintermediation, or re-intermediation, or cybermediation (Giaglis et al., 1999; Killon, 2009; Rensmann and Klein, 2011 and Rossignoli and Francesca, 2015).

Whether the “intermediaries” will totally disappear or reenter the tourism market in a new manner, they will still be needed in the tourism market, and their role will face significant changes in the future (Anderson and Anderson, 2002). Thus, it is crucial to study this phenomenon in the Egyptian market, especially since traditional “intermediaries” in the more developed countries have analyzed and decided their situation in the e-marketplaces. Basically, it was extremely important to determine the current and future status for the traditional “intermediaries” in Egypt as a developing country.

This study aims firstly, to analyze the current and the future situation of the Egyptian tourism “intermediaries” namely, traditional TAs in Egypt, OTAs and Egyptian Facebook Tour Agencies. Secondly, it aims to explore the effect of the e-marketplaces on their business.

Literature Review

Traditional “intermediaries” are defined as "firms that provide matching services for buyers and suppliers in a traditional market" (Chircu and Kauffman, 1999, p. 110).

Continuously, “intermediaries” have been the most important players in the value chain; as they used to connect suppliers and customers from different areas. The value chain would not have been completed without their role (Tsai et al., 2004; Rensmann, 2012; Viljoen et al., 2015 and Camilleri, 2018).

Cooper et al., (2005) clarified that “intermediaries” played an essential role in the tourism industry for both suppliers and customers. As for suppliers, “intermediaries” represent a safe choice; since they sustain buying their services (sometimes in bulk in the case of tour operators). They also help to save part of their time and marketing costs by marketing their services as part of tour operators and TAs packages. On the other hand, the importance of “intermediaries” to customers is to help reaching various sources of information and knowledge. Hence, the buying decision became an easy process to customers. TAs can also save money and time; since they offer them different types of suppliers' services adding to it the intermediary experience. Furthermore, offering a better price than suppliers is an element that attracts consumer to buy from “intermediaries” (buying services in bulk from suppliers offer them discounted prices) (Buhalis, 2001; Ujma, 2001; Ferrell and Hartline, 2008; Hudson, 2008; Neysen, 2008; Killon, 2009 and Kotler et al., 2010).

Moreover, there is a very imperative role for the “intermediaries” for the whole distribution process. They facilitate the searching process, improve the efficiency of the exchange process, make the transaction work as a systematic routine and finally align the produced services with the consumed ones. Additionally, tourism "intermediaries" are responsible to some extent of marketing tourism destinations worldwide, especially in developing countries. (Ujma, 2001).

Travel Agents can be defined based on various definitions of Sheldon (1997), Hudson (2008) and Kumar (2010) as marketing "intermediaries" that link service providers with customers; through buying the services from service providers and selling them to customers for a commission taken from service providers for distributing and marketing their services. TAs could concentrate on one segment or various segments; they also offer variety of services to their customers such as: transportation and accommodation booking, package forming, visa and insurance process……

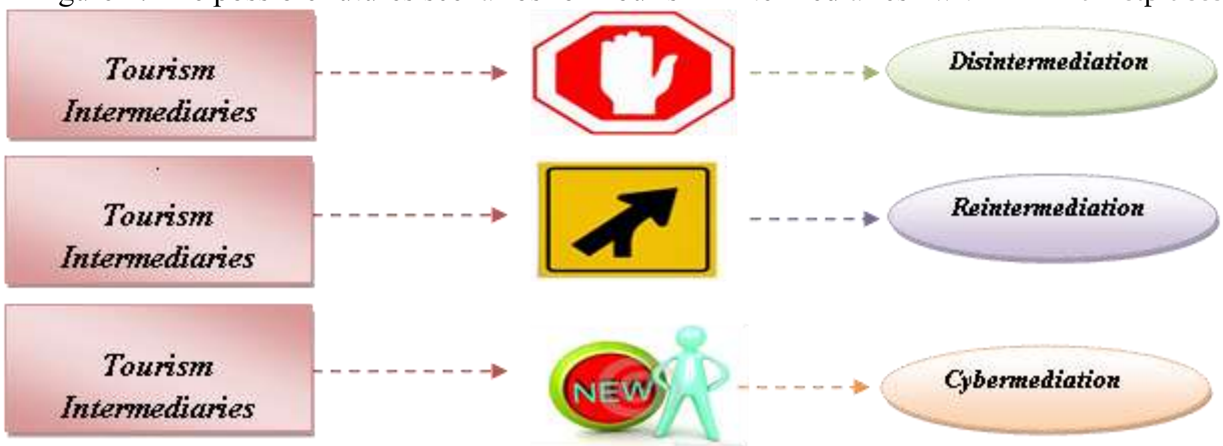
TAs are responsible for various tasks in the tourism market. Their main role is distributing and selling the services offered by suppliers. They are also responsible for any travel reservation and booking details (transportation, accommodation, entertainment…). In addition to that, they supply customers with all their needed information (information providers) concerning their intended destination, travel details, or any needed counseling (consultant) to help them in booking their trip. TAs also develop and arrange any packages and special activities (pilgrimage, business travel or sports trips) professionally (Donlicar and Lasser, 2007; Hudson, 2008 and Kumar, 2010).

TAs tasks are mostly based on gaining a commission, which varies according to their achieved diverse tasks (Hudson, 2008). Yet, TAs are losing their market position due to two main factors: direct booking by which airlines and hotels find their way to the market to sell their services independently or via the internet; while both were reported to cost money, time and labor. For instance, when the TAs select their hotel partner they focus on some major determinates; how the hotel keeps its reservations, the quality of the services offered, the regular basis for paying commission, and finally the reasonability of the room rates. Indeed these determinates add a load over the hotel and give the feeling that they are dealing with one of their customers. Self-booking is another threat that faces TAs work. Customers can now book their trip component without any assistance using the internet (Prideaux, 2001; Hudson, 2008; Kotler et al., 2010; Warner et al., 2010; Hayes and Miller, 2011and Dipoli, 2015).

Dolnicar and Laesser (2007) emphasized that TAs represent the foremost intermediary in the tourism market. The last decade witnessed different changes in ICT that affected their business dramatically; which has led to the disintermediation of many of their business. Last century experienced the real outbound of electronic business. This business highlighted some changes in the role done by "intermediaries". It can be said that TAs are facing an uncertain future as a result of the new e-marketplaces and the trials of service providers, especially airline to cut down the commission they are giving to TAs (Dolnicar and Laesser, 2007; Neysen, 2008; Rensmann, 2012; Del Chiappa and Zara, 2015 and Viljoen et al., 2015). As for Kotler et al., (2010), the tourism market could be partly described as an unsafe environment for traditional "intermediaries"; they are faced by online competitors such as Expedia, Travelocity and Priceline. While the role of TAs is facing some changes, they won't disappear completely (Garkavenko, 2007 and Del Chiappa and Zara, 2015).

All the partners in the Tourism Supply Chain (TSC) have been affected by the changes in the market, tourism "intermediaries" suffered the most from the effect of these changes. Figure 1 illustrated the three possible scenarios that may face the tourism "intermediaries" concerning the effect of e-marketplaces.

Figure 1: The possible futures scenarios for Tourism "intermediaries" within E-Marketplaces



Disintermediation refers specifically to customers dealing directly with manufacturers and bypassing traditional channel "intermediaries" (Viljoen et al., 2015). Kotler et al., (2010) confirmed that the process of disintermediation won't work until there is a value added for the customers from the new "intermediaries"; otherwise the disintermediation process won't take place. Many countries have been facing disintermediation; Switzerland is one of those cases. In Switzerland the share of booking directly depending on TAs has declined clearly in the past years. On the contrary the share of online booking is increasing rapidly (Donlicar and Lasser, 2007). Australian customers also used to depend on traditional "intermediaries" to arrange their holidays and business trips. Soon the case changed as the result of the usage of internet in the tourism market, which offered new "intermediaries" and new distribution channels. No doubt those changes have caused the disintermediation of some TAs from the market (Killon, 2009).

However, there won't be a total disintermediation for all TAs. A considerable number of TAs will still contribute in the TSC. It is not surprising that TAs have to make some changes in the way they are doing their job. Focusing on their role as a travel consultant, targeting customers and being technologically oriented are example of some foremost ways to minimize the probability of TAs disintermediation (Donlicar and Lasser, 2007; Garkavenko, 2007; Kotler et al., 2010; Viljoen et al., 2015). "Through reintermediation previously disintermediated middlemen are offered a new value proposition in order to become part of the distribution channel again", this is how reintermediation is defined (Shunk et al., 2007, p. 249).

As for Viljoen et al., (2015) reintermediation, and validated reintermediation do have a dual meaning. Firstly, reintermediation can be construed as winning back lost customers that have been lost due to disintermediation, and it also could be viewed as adapting business processes in order to retain customers. It is clear that the disintermediated TAs started facing two different paths to secure their market share. Firstly, they focused on redeveloping their business whether by focusing on adding and developing special services, or by targeting special market segment. As for the second path they start benefiting from ICT by building their new place on the e-market. This all proves that the tourism market faces different changes that oblige all tourism partners in the market to stay tuned to be able to face those changes (Dolnicar et al., 2007; Rensmann, 2012; Del Chiappa et al., 2015 and Viljoen et al., 2015).

Viljoen et al. (2015) have proposed a study, which gives a reasonable solution for disintermediated TAs to reintermediate themselves back in the tourism market and to retain customers. The study took place in South Africa, with travel agency owners and managers. The study concluded that there were eight factors shown in table 1 that could be effective in the reintermediation process for the disintermediated TAs generally. Four of those elements (personal interaction, differentiated product (leisure), coexisting with technology and low service fees) were the most effective for the reintermediation process in the case of South Africa. The study recommended TAs that are seeking for reintermediation and gain their market place once more to do their best to get back their customers who were lost in the disintermediation process. It also recommended that TAs should introduce a wide variety of products and services, especially for the leisure sector, keeping a high standard of personnel interaction.

Table 1: Reintermediation Factors for TAs

Factor No.	The factor	Explanation
1	Product Knowledge	The agents should have broad knowledge about the service or product they are selling. The knowledge about the service represents an effective factor in the reintermediation process.
2	Personal Interaction	Personnel interaction between the agent and the customer is a key element in building a long lasting relationship. It is very crucial for TAs that are facing disintermediation to focus on the personal interaction and to gain customer trust; in order to gain their market share again.
3	Differentiated Product	TAs can differentiate their tourism product, by offering customers unique packages. For example offering packages for honeymooners or golfers.
4	Low Service Fees	It is thought that if the service provided is cheap in a recognizable way customers won't spend time to look for another service.
5	High-Quality Service	When selecting a TA, the quality of the service they are offering is a very important element in the selection process.
6	Coexisting with Technology	As the world is changing rapidly, customers needs are changing at the same speed. TAs have to sustain their place in the internet to satisfy their customers' needs.
7	Targeting the Corporate Segment	The corporate market is not as sensitive to price as the leisure market since business pay for the travel arrangements and not the end consumer. It has been asserted that major travel management companies in the United States of America who focus predominantly on corporate clients have been able to avoid disintermediation
8	Targeting the Leisure Segment	Travelling abroad is a more complex travel service that makes customers always seeking for advice from TAs. A lot of consumer research supports this theory and reveals that the more complex the travel product, the more likely consumers are to research it online but make the reservation through a travel agent.
Source: Adapted from Viljoen et al. (2015)		

"Cybermediaries are organizations that bring customers and suppliers of tourism and travel product together on the Internet. They bridge the structural gap between highly complex tourism submarkets and customers facing various types of decision problems" (Rensmann, 2012, p.344).

Ray and Acharya (2004) explained that Cybermediaries should exist and operate in the market space and only in the market space. They emphasized that the main role for cybermediaries is to coordinate information from the consumer behavior and match it with the characteristics of the services and its prices. The process is managed electronically and there is no space for the own view of the cybermediary. Using Cybermediaries gives the customers the opportunity to explore service providers and different services; because the space limitations of the physical store are irrelevant (Jin and Robey, 1999).

The cybermediaries will play a distinctive role in the e-marketplaces, by providing the diverse needs for different entrants in the e-tourism market. Cybermediation will create a new business model that will help the tourism market to be more flexible, have new distribution channels, and reduce costs (Giagles, 1999; Goodman, 2003).

The study of Rensmann (2012) appraised different types of cybermediaries in the tourism market and described their value to the customers. The three types namely; booking sites, comparison sites and online travel agencies. The framework for the cybermediary business is built on the relation between three main participants: the supply side which represents different service providers in the tourism market, demand side which overviews customers with their different demands and problems, and the Cybermediation cloud which links both sides to match the needs of customers with the offers of suppliers and sometimes depending on third party to fulfill this goal. Table 2 describes and summarizes the characteristics of the three different types of cybermediaries.

Table 2: Main Characteristics of the Three Cybermediaries Types

	Booking Sites	Comparison Sites	Online Travel Agencies
Market Focus	Focus on one submarket	Focus on one submarket	Multiple submarkets included
Booking support	Booking conducted by cybermediary	No booking, forwarding to supplier or cybermediary	Booking conducted by cybermediary
Search scope	Search limited to focused submarket and side market(s)	Search exclusively in focused submarket	Integrated search in several submarkets
Search depth	Only direct suppliers of tourism products are included	Other cybermediary websites are also searched	Only direct suppliers of tourism products are included
Search functionality	Standard search functionality	Extensive search and filtering functionality	Special search masks for integrated search, standard functionality
Source income	Booking fees, commission paid by suppliers	Mostly ads and paid referrals	Partly booking fees, partly commission paid by suppliers
Examples	Tbooker, fluege.de, booking.com, hotel.de, carrentals.com	Qfly, Trivago, Swoodoo, Skyscanner, Kayak	Expedia, Travelocity, Opodo , lastminute.de
Source: Rensmann, 2012, p.352			

According to Garkavenko (2007) most of travel agencies would not be able to complete their business life in the Tourism market. This fact is basically built on two different reasons, loosing

TAs to their whole business; due to their inapplicable performance, and the second reason is the merges that happen in market. Chaffey and Smith (2008) also confirmed that the more complex the service or product is, the more opportunity it has to market online. This gives TAs a new way to reenter it back and gives it a wide opportunity to market their services online.
The following part involves the methodology of research where a field research was conducted to answer research questions.

Research Methodology

This study is concerned with the effect of the e-marketplaces on the tourism "intermediaries", which is considered to be an important topic that crucially affects the tourism market. The research point has been discussed in many developed countries (Buhalis and Licata, 2002; Resmann, 2012; Del Chiappa and Zara, 2015; Eriksson, 2015 and Viljoen et al., 2015), but studying this phenomenon in developing countries is even more essential; since the e-market concept haven't been yet matured. Therefore, analyzing the market in light of this emerging technology throughout scientific analysis and solution strategies is considered to be an addition to the field.
The field survey aims to collect and analyze pertinent data in order to answer the research questions and to anticipate and depict scenarios for tourism "intermediaries" (i.e. TAs) in the presence of e-marketplaces in Egypt.
The three research questions were as follow:
Q1: What are the effects of e-marketplaces on tourism "intermediaries" in Egypt?"
Q2: What are the opportunities and challenges that are facing Egyptian TAs in the tourism e-marketplaces?)
Q3: Which scenario/scenarios (disintermediation, re-intermediation, and cybermediation) is/are predicted to domain the Egyptian tourism market in the future?
This study used a qualitative research approach relying on interviews in order to collect the data necessary for answering the research questions. Qualitative research has been utilized here as the researcher wanted to explore the effect of the e-market places on tourism intermediaries. The researcher seeks to understand the contexts (settings) in which participants in a study address a problem or issue (Creswell, 2009).
Therefore, evidence of multiple realities includes representation of the actual words of different actors and presenting different perspectives of individuals (Creswell, 2009).
The concept of purposeful sampling is used in qualitative research. Sites or individuals are selected as they can purposefully inform an understanding of the research problem or the central phenomenon of the study (Saunders et al, 2012).
Purposive or judgemental sampling enables the researcher to use his/her judgement to select cases that will enable the answers to the research question to emerge and thus, to meet the research objectives. This approach is often used when working with very small samples (Neuman, 2007).
In non probability sampling techniques, the issue of sample size is unclear as there are no rules for purposive sample. The sample size is dependent on the research questions and objectives, what will be useful, what will have credibility and what can be achieved within available resources (Patton, 2002). Overall, the validity and the insights will be gained from the data and its analysis rather than through the size of the sample (Patton, 2002).
Three traditional TAs were chosen to represent the SMTEs (Small and Medium Tourism Enterprises) especially in Alexandria. This sample will be able to give an overview of the current

situation of the traditional TAs in Egypt, since most SMTEs in Egypt are dealing with the e-marketplaces using mostly the same strategies. As for OTAs the major and the only OTA in Alexandria and the first OTA that started in Cairo were chosen. As no official licenses were granted to OTAs in Egypt, the researcher chose the most trusted and well known TAs that were adapting the work strategies of OTAs in Egypt. As for the facebook agencies three of them were chosen to draw an overview about this new none authorized competitor to the TAs in Egypt.

A purposive sample was the sampling technique used as it was the most convenient; to reach specific CEOs of TAs in the industry that could give a realistic and comprehensive view of the tourism “intermediaries”' situation throughout the e-marketplaces in Egypt. Table 3 expresses the codes used for every type of intermediary. The interviews took place from June to August 2018.

Table 3: Tourism “intermediaries” Interviews

Type of Interviewed Travel Agency	Code
Traditional TA	TTA1
Traditional TA	TTA2
Traditional TA	TTA3
Online TA	OTA1
Online TA	OTA2
Facebook TA	FTA1
Facebook TA	FTA2
Facebook TA	FTA3

The interviews with Egyptian tourism “intermediaries” intended to have an overview of current situation of TAs after the emergence of the e-marketplaces. Also the interviews shed light on the opportunities and the challenges facing the Egyptian TAs according to the new emerging situation. The following guidelines were used:

- General awareness of the emergence of e-marketplaces.
- The changes that occurred as a result of the emergence of e-marketplaces concerning:
  - ► TAs and their relation with Customers,
  - ► TAs and their relation with Service providers.
- Tourism “intermediaries” strategies in the presence of e-marketplaces.
- Opportunities and challenges facing tourism “intermediaries” in the e-marketplaces.

Results and Discussion:

The interviews were carried out with three types of tourism “intermediaries” namely traditional TAs, facebook TAs and OTAs. The results were represented according to the following:

General Awareness of the Emergence of E-Marketplaces

CEOs of the interviewed “intermediaries” stated that the Egyptian tourism market was classified into six main categories of tourism “intermediaries”:

» Tour operators (mega powers)
» Traditional TAs (mostly SMTEs) that are working using the classic way of marketing
» Traditional TAs that have reentered the market by being OTAs (Reintermediation)
» New Cybermediaries (OTAs) that enter the market for the first time
» Online Facebook TAs
» TAs that work basically on the religious tours (Haj & Omra) and some internal trips.

The above classification proved that the emergence of tourism e-marketplace has greatly affected the business of "intermediaries".

The traditional TAs CEOs confirmed that they are still relying on their classic way in marketing. Their work is highly dependent on selling airline ticket. About 60% of their work is directed to flight bookings. The rest of their work is equally divided between their packages and hotel bookings. Since service providers are now heading their distribution towards online resources; TAs had to pay more attention to their packages. Most of the SMTEs in Egypt are directing their campaigns towards Egyptian customers, giving slight attention to inbound tourism. The SMTEs are focusing on Egyptian customers by following a B2C model. As for the SMTEs that target inbound tourism /foreigner customer, they depend on B2B model. They work with other foreigner TAs to promote and distribute their packages.

"We used to depend on our packages by 20% of our total agency work. Airline bookings represented the main part of our work which represents about 60%. Unfortunately, this isn't the case now." (TTA1). These results agree with the results of Camilleri (2018) who emphasized that commission cutting by airlines was the first alarm for TAs to losing their market. SMTEs were mostly affected by commission cuts; as larger agencies and wholesalers depended on commissions from corporate customers.

CEOs of the interviewed OTAs stated that OTAs started to join the Egyptian market from 2002. In Egypt, we can differentiate between two types of OTAs. The first was traditional TAs that decided to change their business and reintermediate themselves in the e-marketplaces (OTA1). The second type of OTAs entered the market for the first time as cybermediaries (OTA2). Unfortunately, cybermediaries that enter the market for the first time have to get a license as a traditional TA. The Egyptian Ministry of Tourism (MoT) doesn't issue a so-called "online TA license". As a result, any business looking to establish an OTA has to issue a license of a traditional TA to be able to enter the market. It became obvious by the interviewees that both types of OTAs were concentrating with almost 95% of their work on packages targeting foreign customers.

"We work using a B2C business model; all my staff are working hard to serve our customers." (OTA1)

Although Akbar Kabir et al., (2012) stated that e-commerce SMTEs are focusing in their market relation on B2B and B2B2C model with about 80%, the results of the interviews showed that SMTEs in Egypt are focusing on B2C model with almost 95% which shows that SMTEs in different countries have reacted differently to the emergence of e-market places.

Facebook Travel Agencies represent another type of agencies that entered the tourism market, mostly operated by youth and fresh graduates. Through the interview it was concluded, that most of these agencies work with no license; because the license for a TA is very expensive in a way that those youth can't afford. Nevertheless, some of them tried to have a legal existence in the market by registering themselves in the MoT. They registered as Office for Tourism Services or Conference organizers. They sometimes work in corporation with licensed TAs. Those facebook agencies are targeting all their work towards forming internal packages to Egyptian customers. "We need to have a legal form to be in the market. The MoT support is very crucial for us." (FTA1)

CEOs of the OTAs also clarified that the market also witnessed the emergence of organizations supporting e-marketing of tourism services. International Organization for Electronic Tourism Industry (IOETI) has a branch in Egypt; unfortunately it isn't supported by the MoT. Therefore, the role of the organization is limited to training. Their training programs target fresh graduates up to TAs which need guide lines and plans to for their OTAs.

Results also proved that the Travel Agents Association offers TAs training to help traditional TAs to launch websites supporting e-booking possibilities.

> "At the association we are offering TAs training that helps them to launch websites that supports customer online purchases. But still TAs find it a long and complicated process in which they don't want to spend their efforts and money." (Expert 3)

The Changes that Occurred as a Result of E-Marketplaces' Concerning
TAs and their Relation with Customers

The interview results confirmed that customers are currently the dominants of the market, and any change in their characteristics affects the market to a great extent. The emergence of the e-marketplaces has affected the customers in different ways. They find that new market variables (i.e. e-market places) are more convenient and effective for them.

As for the interviewed traditional TAs, they referred to the customers as being more aware and experienced. There are many online sources that provide them with information. In most cases customers search for different prices through different websites before consulting the travel agent and they head for travel agent for the final booking. The customers are also able to compare between the different prices and services because of the vast amount of different online suppliers and offers and therefore able to evaluate if the service is going to add specific value or not.

> "I'm not the only consultant for the customer as I used to be" (TTA2)

The vast majority of SMTEs customers are Egyptians as stated by traditional TAs. But not all Egyptian customers are TAs customers. There are some categories that still prefer TAs. Senior customers prefer to find a trusted TA, where they can choose their package and pay for it. Another type of customers that still prefer TA's are customers who don't feel safe to use their credit cards online. Moreover, Customers looking for TA experience and searching for tangibility are another type of customers who still depend on TAs. According to the interviewees, “Customers from the rural areas are also a type that depends to a great extent on TAs to buy any tourism service”. Those customers may have internet illiteracy or just feel insecure to purchase online.

As for the interviewed OTAs and facebook pages, they mentioned that their customers are mostly from youth category. Youth think online booking is more easy, cheaper, accessible and available. "We can generally say that online booking is more convenient to youth customers from their point of view." (OTA2)

These results are consistent with the results of Donlicar and Lasser, (2007) and Camilleri, (2018) that confirmed that online purchase gives customers the ability to purchase the tourism service any time and in any place. Customers can access much information, compare prices and buy by their credit cards.

What differentiates OTA customers from facebook agencies' customers is the origin of the customers. OTAs target foreign customers mostly from America, England, Italy, France, Portugal, Spain and Germany; whereas facebook agencies' are basically targeting Egyptian customers.

TAs and their Relation with Service Providers

Interviewed CEOs of Traditional TAs pointed out, that the relation to service providers has been affected dramatically, due to e-market changes. The relation with the airlines was much affected since the TAs were accustomed to depend on 60% of their business on airline bookings, and now this percentage has extremely decreased to reach about 20%. A drop by 40% severely affected the TAs business. The interviews with the TAs revealed that the reason that airlines still depend on them is to distribute their tickets; to facilitate any complications concerned with airline bookings (e. g luggage allowance- connection flights- airport terminals). Furthermore, cancellation policies and sometimes restricted changes are not available on airline websites. TAs still book airline tickets using GDSs as they always did.

The TAs relation with hotels has also been affected. Their booking relation is based on bulk booking for TAs packages. The booking is done also based on traditional ways such as phone calls or e-mails.

TAs job is mostly based on packaged trips. The results of the study of Donlicar and Lasser (2007) emphasized that TAs are still basically involved 'only' in the booking of packaged tours and air transportation, but not with accommodation booking directly.

The results of OTAs and facebook agencies concerning their relations with service providers showed almost the same results of traditional TAs. OTAs relation with airlines was not affected than before; because their work is based on booking flight tickets to form their packages. Facebook agencies do not depend on flight to form their packages, they depend more on ground transportation.

Tourism "intermediaries"' Strategies in the Presence of E-Marketplaces

All types of tourism "intermediaries" are adapting new strategies to help them keep their customers and gain new customers. The type of strategy differs according to the type of intermediary. Results of the interviews highlighted those strategies as follows:

Through the interview it was clear that, Traditional TAs strategies are following new marketing strategies' whether online or offline. Strategies that CEO shed light on were:

- TAs support their B2B model. Corporate relation is an evident example of this; especially for TAs targeting Egyptian customers. TAs search for more deals with different types of corporate at the market. As for TAs that target foreign customers (inbound tourism), they develop relations with foreign TAs.
    - "I have just arrived from the USA on a business visit to some TAs there. I was trying to make some deals using indirect marketing strategies through promoting Egyptian sites. Deals with foreign TAs represent my main source for foreign customers." (TTA1)
- Sponsoring some events became a new approach to TAs to support their position in the market.
    - "Being a sponsor for some shows such as the Disney shows in Egypt, or sports events such as the last football world cup in Russia; supported our market position so much". (TTA2)
- Offering customers some extra free services such as a free meet and assistance at the airport, free limousine services for the business class flight. Moreover, they can also offer VIP treatment in hotels for certain customers (especially for customers booking their flight ticket in the business class).
- Most TAs have a website page, a facebook page and an Instgram. Generally, TAs focus their marketing on the facebook pages. Only one of the interviewed TAs clarified that they support the purchasing process on their websites. However, CEO of this TA confirmed that they didn't activate this process or even depend on it.

The interview proved that OTAs support different online marketing strategies. CEOs for interviewed OTAs clarified the different strategies they use during their work:

- Forming packages including other destinations together with/without Egypt.
    - "Since our customers are asking to visit other destinations rather than Egypt. We decided to form packages to other destinations as India, Oman, Dubai, Morocco, Africa, Turkey and Jordan. Those packages made us gain more customers." (OTA1)
- Structuring special themed packages.
    - "We offer our customers special themed packages such as: Archeology lovers, Ultimate Luxury, Honeymoon packages, Abu Simbel Sun Festival and Long Nile Cruise." (OTA2)
- Supporting many languages on the website. This shows how much the agency is keen to serve its customers with their language.
    - "Our website supports generally ten languages (American English, British English, Italian, Spanish, Portuguese, French, German, Chinese, Japanese and Russian). If you accessed our website you won't find the last three languages in the language choices. These countries are not so much oriented by booking online; but sometimes few of their customers use online purchase. This proves how we are studying our targeted markets deeply." (OTA- CEO 4)
- Making special offers all the year through.
    - "Special offers always attract customers. All through the year OTA1is offering its customers a variety of special offers. We have Black Friday offers, Christmas and New Year offers, Easter offers and much more…" (OTA1)
    - "At the beginning of my work I made special and crazy offers. The offer was to pay only if you are satisfied. I told my customers you won't pay for your trip until you come and feel satisfied with our services; if you weren't satisfy don't pay. This offer was the main purpose for my success." (OTA2)

The interview showed that the facebook agencies are utilizing limited strategies as their business is small scaled, and not based on a clear analysis and experience. Their strategies are:

- Most of their work is based on e-WOM promotion. They always encourage uploading their views and pictures as a positive e-WOM promotion to their business.

- "We are concerned with the comfort zone surrounding our customers. Satisfying our customer will help us reach more people of his comfort zone"

- Creating special memories to customers.

- "We have a crew of our specialized photographer. We take photos to our customers during our trips and send them to the customers privately not on our facebook page." (FTA3)

- They are working on special destination to sustain reasonable prices. Most facebook agencies are packaging trips to Siwa, Dahab and Nuebaa.

According to the above part of the "intermediaries'" interview the answer to the first research question" Q1: What are the effects of e-marketplaces on tourism "intermediaries" in Egypt?" could be as follows:

The e-marketplaces have changed the business of traditional "intermediaries" in several ways.

The overall business of TAs has changed due to the emergence of the e-marketplaces. Some TAs found it a new and good market to work in. These TAs reintermediate themselves by building their OTAs to be part of the e-marketplaces. New cybermediaries have started from scratch constructing OTAs. Also fresh graduate and youth started having facebook agencies working to form tourism packages.

This affected the market share of the traditional TAs. Every new partner enters the market represents a new challenge to TAs business.

The relation between TAs and service providers has changed. Service providers are focusing on B2C model by using direct market channels. This was the main reason why the changes in the relation between service providers and TAs took place. Additionally, concerning B2B indirect channels, cybermediaries are sharing TAs in distributing services. Remarkably, airline and TAs relation was mostly affected than hotels.

The customer and TAs relation were also facing some changes. Customers are wiser and more experienced than before. They come to TAs with gathered information and a variety of prices. The youth and the middle aged customers became more oriented to book their trips online. This limited the customer category that TAs are dealing with.

TAs started building on some new strategies to support their market situation. Most of their marketing strategies weren't based on a clear analysis of the market. This was clear because they were still in a way or another focusing on their B2B relations. Only the online strategies that they used were concentrating on the B2C relation. Unfortunately, they described some of their online tools by being not that much important to them.

Opportunities and the Challenges Facing Tourism "intermediaries" in the E-Marketplaces

The results of this part of the interview give answers to the second research question:

Q2: What are the opportunities and challenges that are facing Egyptian TAs in the tourism e-marketplaces?) and are demonstrated in table 4.

Table 4: Opportunities and Challenges Facing Tourism "intermediaries" in the E-Marketplaces

Type of TA	Opportunities	Challenges
Traditional TAs	1. Focusing on the role of TAs as tourist consultants, through their market experience. 2. Targeting customers who still depend on TAs with special programs will assure customer loyalty (Senior packages- Family packages). 3. Forming packages to new destinations. 4. TAs could cooperate with facebook agencies or other SMTEs to offer better opportunities for both of them. 5. E-market places are a major advantage for TAs if they started establishing their own websites that support purchasing opportunities. Through this, they can combine both opportunities of TAs and OTAs.	1. Service providers invest heavily in their B2C business using direct marketing channels thus reducing the share of traditional TAs. 2. Cybermediaries are also intruding in the B2B relation between TAs with service providers to gain a market share. 3. Some airlines are offering their customers full packages or all the package elements separately. 4. Changes in the Egyptian customer behavior and being more oriented to buy online. 5. Service providers and customers seem to benefit more from pushing the TAs out of the value chain. 6. The internet offers customers a variety of choices surrounding them all the time and in any

	6. Some TAs have their websites supporting online purchase; but they do not count on it heavily.	place. 7. OTAs represent an important challenge to the traditional TAs. 8. Facebook Agencies gained part of the market share of TAs; especially domestic packages. 9. In times of crises, TAs loose a huge percent of their work.
OTAs and Facebook TAs	1. Service providers depend on cybermediaries as indirect distribution channel. 2. Egyptian customers are online oriented in booking tourism services. 3. Availability to reach different type of customers in different places. 4. Reaching customers 24/7. 5. Using interactive promotional and marketing tools. 6. Banks are supporting the online payment process, through offering online payment systems. 7. In time of crises, OTAs keep a satisfactory percent of their customers; in a way that sustain their break even.	1. Egyptian MoT doesn't grant official license for OTAs. 2. The Ministry of Communications and Information Technology MCIT doesn't support the OTAs with their needed infrastructure of internet lines. 3. All the work of OTAs is based on individual efforts without any Governmental support. 4. No training programs are offered from the MoT to guide the work of OTAs. 5. OTAs and Facebook TAs have experienced employees in e-marketing and internet technicals. 6. There is no comprehensive online tourism marketing campaign representing Egypt. 7. There are still some customers who don't prefer to use their credit cards for online purchases. 8. Tour operators through their strong market position are against the concept of e-marketing. 9. High costs for launching websites and e-marketplaces access.

Results on table 4 represent the opportunities and challenges facing tourism “intermediaries” in the Egyptian market after the emergence of e-marketplaces. Traditional TAs have some opportunities that can support their work in the market. The first and second opportunities are supported by the results of the studies of Prideaux (2001); Kotler, et al. (2010) and Viljoen et al. (2015). The third opportunity matched the results of the study of Del Chiappa and Zara (2015). It proved that when customers are visiting a new destination they mostly prefer to depend on traditional TAs to form their packages. The fourth opportunity is substantiated by the work of Garkavenko (2007). He stated that cooperation and consolidation between SMTEs will be an important step to enhance their market situation and share. The fifth opportunity is based on the model of OTA1 tours which is a pioneer Egyptian OTA. It also matches the results of the study of Viljoen et al. (2015).

The challenges stated in the table were also based on the results of the field study and the literature. The first challenge is based on the results of the studies of Davidson, 2001; Prideaux, 2001; Garkavenko, 2007 and Sismanidou et al., 2009. The third challenge is supported by the study of Chiu et al. (2015). The results of the study of Benjamin and Wigand (1995) substantiate along with the field study results the fifth challenge. The sixth challenge is based on the results of the studies of Chaffey et al. (2008) and Garkavenko (2007). As for the last three challenges, they are supported by the results of the “intermediaries” interviews.

Obviously, the results indicated that OTAs and facebook agencies are also facing some opportunities and challenges. The first, second, third, fourth and fifth opportunities are supported by the results of Donlicar et al. (2007) and Camilleri (2018). The sixth opportunity was supported by the results of the “intermediaries” interviews.

> "There are three banks that offer the online banking services in Egypt. Bank Misr, AlAhly Bank and CIB." (OTA2)

Results of the “intermediaries” interviews substantiate the seventh opportunity.

> "In crisis I am always insuring my break even from my packages. I remember after the crisis of 25th January, specifically on March, we were performing our packages normally. Some of our foreign customers were asking to visit the places where the revolution/protests took place." (OTA1)

All the challenges listed in the table are supported by the results of the CEO of OTAs interviews and also the study of Akbar Kabir et al. (2012).

It is worthwhile to overview the future of the tourism “intermediaries” by answering the study's third question, which should suggest which scenario is predicted to domain the Egyptian tourism market.

Q3: Which scenario/scenarios (disintermediation, re-intermediation, and cybermediation) is/are predicted to domain the Egyptian tourism market in the future?

The “intermediaries” in the Egyptian market are forecasted to face one of the three scenarios; as a result of the emergence of the e-marketplaces.

Disintermediation is the first possible scenario. Although, there was no clear disintermediation recorded in the market, CEOs of TAs and OTAs emphasized that being part of the e-marketplaces is becoming a must. Sooner or later TAs that won't invest to be online will get out of the value chain.

Re-intermediation is the second possible scenario. Traditional TAs which realized the power of the e-marketplaces, decided to find for themselves a place there. Transformation from traditional TAs to OTAs was their strategy to join the e-marketplaces. A clear and successful model representing this case in the Egyptian market is OTA1.

Cybermediation is the last possible scenario. Egyptian market witnesses new online “intermediaries” that entered the tourism market for the first time in the cyber space. They weren't a traditional TAs before. OTA2 was a representing model of this scenario in Egypt.

The tourism market is a dynamic and changing market especially in the presence of the changes to e-marketplaces; therefore the research was not able to decide which scenario would domain in the Egyptian tourism market. The last two scenarios were clearly recognized in the market. The first scenario wasn't supported by any obvious cases yet, but the results prove it’s a predictable scenario sooner or later.

Conclusions and Recommendations

The evidence of the current study aimed at exploring the effect of e-marketplaces on the Egyptian tourism "intermediaries". It became clear by the study's results, that the business environment of the Egyptian tourism "intermediaries" witnessed many changes.

The results of the Egyptian "intermediaries" survey highlighted the major changes that took place in the Egyptian tourism market. New competitors emerged in the tourism market affecting the business of TAs. International cybermediaries, Egyptian OTAs, facebook travel agents and service providers' websites have redesigned the market place of the tourism industry. Nevertheless, customers being more inclined to buy online; has made TAs lose a non-deniable part of their market share. TAs strategies to face the challenges of e-marketplaces continue focusing on their old approaches. They concentrate on developing their B2B relations with foreign TAs, sponsoring some events and offering customers some free services. The only new approach that some TAs are adopting is having a website and facebook pages as an online marketing tool.

Although some TAs decided to reintermediate themselves to be OTAs in order to benefit from the e-marketplaces' privileges, they have so far found themselves facing new challenges concerning the infrastructure and MoT support. The newly established OTAs shared the same challenges as traditional TAs, in addition to the problem of having an online license.

The study results and findings conclude that although the future of TAs seems to be debatable, so far the business of TAs will not withdraw completely. TAs will complete facing changes, but they have to manage new strategies that could help them develop their work. For instance, Traditional TAs have to realize that the only path which can secure their survival in the ICT tourism market is to add value to their customers. (ex: forming packages that are designed according to customers' needs), create a customer activity profile; that helps in distinguishing the different travel needs for every customer. This will help in targeting customer needs more easily, support their role as a travel consultant, through forming their consultant teams, develop customer relation strategy and finally develop reward programs for their customer and promotional offers.

Cooperation between SMTEs together or between them and the facebook agencies will enable them to gain more market share, more techniques and a better financial position. Also, cooperation with tourism destinations will provide a dual benefit for both of them.

TAs are recommended to develop their own websites and focus on their online marketing strategies. Applying the online strategy (SOSTAC model) suggested, will help in TAs involvement in the e-marketplaces. Finally, online presence of TAs must be described by being honest and trustable in all their offered information.

Concerning recommendations directed to OTAs, it is suggested to direct part of their marketing efforts to Egyptian customers. It is recommended to target the Egyptian customers travelling for entertainment trips especially customers travelling with their friends.

In order to overcome the problem of insecurity of online payments, OTAs can support cash direct payments at their agencies (especially for Egyptian customers). Cooperating with traditional TAs is suggested to reach the foreign markets that still prefer using traditional booking methods. It is also recommended, that Egyptian OTAs should locate themselves on Recommender Systems (RSs) websites.

Facebook agencies should prepare more programs to more Egyptian destinations. It is also suggested that Facebook agencies target new customer segments offering them the appropriate tourism packages. Cooperation with other traditional TAs or OTAs is recommended to have a more formal way of working. Furthermore, Facebook agencies should invest more in their marketing strategies and have their own websites.

The results of the study showed that countries looking for a better tourism e-commerce future must concentrate on sustaining the relation between government and private sector to build comprehensive and consistent policy approaches for the future of the industry. MoT should grant online licenses for OTAs and adopt a more comprehensive online marketing campaign for Egypt.

Moreover, the Egyptian Ministry of Communications and Information Technology has to support the OTAs with their needed infrastructure and ICT facilities. Giving support to OTAs in marketing Egypt internationally is necessary especially in crises times. The related authorities should support training programs for TAs that are starting an entrepreneurial business in the tourism e-marketplace. Furthermore, MoT has to set rules and laws to control the work of the OTAs.

The close cooperation of stakeholders is needed in order to be able to survive this new worldwide emerging trend. Tourism “intermediaries” should maximize opportunities and face challenges with appropriate strategies in order to face disintermediation.

Future Research

More research should be dedicated to explore the effects of e-marketplaces on tourism intermediaries by engaging more applicants in the research in order to have a clearer overview from a wider sample about the changes, challenges and opportunities affecting intermediaries in the emerging e-marketplaces. In order to support qualitative research results, quantitative research methods like questionnaires could be also utilized to answer research questions.

Future studies should also focus on which specific customer segment the Egyptian TAs have to target to reintermediate themselves in the tourism market. Future studies should investigate the effect of Recommender Systems in supporting the trustworthiness of different types of e-intermediaries.

Economic aspects affecting the job of online TAs and the e-marketplaces; especially in Egypt, are an important issue that needs to be resolved in future studies. A better understanding is still needed on how online channels and media are used by different types of travelers in different types of travel situations, thus taking a dynamic situational perspective, combining characteristics of travelers with characteristics of trips. Finally, more research needs to be done to explore the challenges facing OTAs business in Egypt.

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