

Omnichannel Readiness of Hotel Distribution Systems in an Emerging Tourism Destination: Evidence from Labuan Bajo, Indonesia

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ABSTRAK

Perluasan pesat saluran distribusi digital telah mengubah praktik pemasaran dan pemesanan hotel, khususnya di destinasi pariwisata yang sedang berkembang. Studi ini mengkaji kesiapan omnichannel dari sistem distribusi hotel di Labuan Bajo, Indonesia, dengan tujuan untuk memahami tingkat ketergantungan terhadap perantara, integrasi sistem, serta implikasinya pada tingkat destinasi. Pendekatan studi kasus kualitatif digunakan dengan menggabungkan analisis data pemesanan hotel dan wawancara semi-terstruktur dengan manajemen hotel. Penelitian ini menilai konsentrasi distribusi, ketergantungan terhadap saluran, serta tingkat integrasi antar sistem distribusi utama menggunakan kerangka penilaian kesiapan berbasis wawancara. Hasil penelitian menunjukkan adanya ketergantungan yang tinggi terhadap platform perjalanan online, dengan volume pemesanan yang terkonsentrasi pada sejumlah kecil perantara global. Meskipun terdapat berbagai saluran digital, hasilnya menunjukkan bahwa kesiapan omnichannel masih terbatas akibat integrasi sistem yang terfragmentasi, yang berdampak pada ketidakkonsistenan dalam pengelolaan pengalaman pelanggan. Studi ini juga menunjukkan bahwa keterbatasan kesiapan omnichannel tidak hanya menjadi tantangan pada tingkat perusahaan, tetapi juga merupakan isu pengembangan destinasi, karena sistem distribusi hotel yang terfragmentasi dapat melemahkan konsistensi pengalaman dan daya saing destinasi. Penelitian ini memberikan kontribusi pada literatur pariwisata dan perhotelan dengan menyajikan bukti empiris dari destinasi pariwisata yang sedang berkembang, serta memposisikan ulang kesiapan omnichannel sebagai bentuk infrastruktur lunak dalam pengembangan destinasi. Temuan ini memberikan wawasan praktis bagi operator hotel, organisasi pengelola destinasi, dan pembuat kebijakan dalam memperkuat kapabilitas distribusi digital serta mendukung pengembangan pariwisata berkelanjutan di destinasi berkembang.

ABSTRACT

The rapid expansion of digital distribution channels has reshaped hotel marketing and booking practices, particularly in emerging tourism destinations. This study examines the omnichannel readiness of hotel distribution systems in Labuan Bajo, Indonesia, with the aim of understanding the extent of intermediary dependency, system integration, and destination-level implications. A qualitative case study approach was employed, combining analysis of hotel booking data with semi-structured interviews with hotel management. The study assessed distribution concentration, channel dependency, and the level of integration among key distribution systems using an

interview-based readiness scoring framework. The findings reveal a high dependency on online travel platforms, with booking volumes concentrated among a small number of global intermediaries. Despite the presence of multiple digital channels, the results indicate limited omnichannel readiness due to fragmented system integration, resulting in inconsistent customer experience management. The study further demonstrates that limited omnichannel readiness is not only a firm-level challenge but also a destination development issue, as fragmented hotel distribution systems may undermine experience consistency and destination competitiveness. This research contributes to tourism and hospitality literature by providing empirical evidence from an emerging tourism destination and by reframing omnichannel readiness as a form of soft infrastructure within destination development. The findings offer practical insights for hotel operators, destination management organizations, and policymakers seeking to strengthen digital distribution capabilities and support sustainable tourism development in emerging destinations.

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1. INTRODUCTION

The rapid expansion of digital distribution channels has fundamentally transformed the hotel industry, reshaping how accommodation services are marketed, booked, and consumed. Online Travel Agents (OTAs), brand websites, global distribution systems, and offline travel agents now coexist within increasingly complex distribution ecosystems. In this context, the concept of omnichannel strategy which emphasizes integration, consistency, and coordination across all customer touchpoints, has gained prominence in hospitality and service marketing literature (Selvaraj, 2025; Utami & Darma, 2024).

Recent tourism studies published in *Jurnal Kepariwisata Indonesia* have emphasized the growing importance of smart tourism and smart destination frameworks in enhancing destination competitiveness, service integration, and visitor experience quality (Gunawan et al., 2025; Prasetyo & Irawati, 2025). These studies highlight how digital technologies, data integration, and collaborative platforms increasingly shape destination management and tourism governance in Indonesia, providing a broader context within which omnichannel strategies can be understood as a critical component of destination digital readiness.

For hotels operating in emerging tourism destinations, digital distribution channels play a particularly strategic role. Limited brand recognition, geographic peripherality, and information asymmetry often push hotels in such destinations to rely heavily on OTAs to access global markets (Law et al., 2015). While this dependency can accelerate demand generation, it also raises concerns regarding distribution concentration, rising commission costs, limited customer data ownership, and reduced strategic autonomy (Knudsen et al., 2022). These challenges are increasingly relevant for destinations that aim to move beyond short-term visitor growth toward sustainable competitiveness.

Labuan Bajo, designated as one of Indonesia's priority tourism destinations, provides a compelling context to examine these dynamics. Rapid tourism development, growing international exposure, and increasing hotel investments have been accompanied by a strong dependence on global digital platforms. Previous research on small-scale accommodation providers in Labuan Bajo

has shown that the adoption of OTAs and their integration with channel management systems significantly improved operational efficiency, occupancy rates, and global market access, reinforcing the role of OTAs within the local smart tourism ecosystem (Ciptosari & Halim, 2025). Despite this growth, anecdotal evidence and industry observations suggest that many hotels continue to operate fragmented distribution systems, with limited integration between OTAs, property management systems (PMS), direct booking channels, and customer relationship management (CRM) tools. This raises a critical question: to what extent are hotels in emerging destinations ready to implement an omnichannel distribution strategy?

Existing tourism policy discussions in Indonesia largely emphasize physical infrastructure, destination branding, and promotional strategies. However, the digital readiness of accommodation providers, particularly in terms of integrated distribution systems, remains underexplored. Without adequate omnichannel readiness at the hotel level, destination-level efforts to enhance visitor experience consistency and long-term competitiveness may be constrained.

Therefore, this study aims to examine the omnichannel readiness of hotel distribution systems in an emerging tourism destination, using Labuan Bajo, Indonesia, as an empirical case. Guided by these objectives, the study addresses the following research questions: RQ1: How dependent are hotels in Labuan Bajo on OTA-based distribution channels? RQ2: To what extent do hotels demonstrate integrated omnichannel readiness across their distribution systems? RQ3: What are the implications of limited omnichannel readiness for customer experience consistency at the destination level? By addressing these questions, this study contributes to ongoing discussions on digital transformation, hospitality distribution management, and destination development in emerging tourism contexts.

2. LITERATURE REVIEW

Prior research on hotel distribution systems has predominantly focused on the strategic role of OTAs, pricing parity, and channel performance from a firm-level perspective (Buhalis & Leung, 2018; Law et al., 2015). These studies highlight how digital intermediaries enhance market reach and booking efficiency, particularly for small and independent hotels. However, they also caution against excessive dependency on dominant platforms, which may weaken hotels' control over pricing, customer relationships, and data assets. While this stream of research provides important insights into channel performance, it largely emphasizes channel adoption and utilization, rather than the integration of multiple distribution systems.

The omnichannel concept, originally developed within retail and service marketing literature, emphasizes seamless integration across channels to deliver a consistent customer experience (Beck & Rygl, 2015; Verhoef et al., 2015). In contrast to multichannel approaches, omnichannel strategies require interoperability between front-end and back-end systems, as well as unified customer data management. In hospitality research, however, omnichannel discussions remain relatively limited and often concentrate on large hotel chains in mature markets, where technological infrastructure and managerial capabilities are more advanced (Buhalis & Leung, 2018). As a result, empirical evidence on omnichannel readiness in emerging tourism destinations remains scarce.

Moreover, existing studies tend to conceptualize omnichannel readiness as an organizational or technological capability, overlooking its broader implications for destination competitiveness. Tourism scholars have increasingly argued that visitor experience is co-created across multiple service providers and channels, suggesting that fragmented hotel distribution systems may negatively affect destination-level experience consistency (Rather et al., 2022). Studies on smart tourism and smart destination emphasize the importance of data integration and stakeholder coordination, yet provide limited insights into how hotel distribution systems contribute to such integration at the operational level, particularly in emergin destination.

This study addresses these gaps by offering three key contributions. First, it provides empirical evidence on OTA dependency and omnichannel readiness in an emerging tourism destination context, where digital adoption dynamics differ from those in mature markets. Second, it shifts the analytical focus from channel adoption toward system integration and readiness, operationalized through a multidimensional assessment of hotel distribution systems. Third, and most importantly, it reframes omnichannel readiness as a destination development issue, highlighting its implications for experience consistency, tourism governance, and sustainable destination competitiveness. By doing so, this study extends existing hospitality and tourism literature by linking hotel-level distribution system integration with destination-level development discourse. Unlike existing studies that treat omnichannel capability as a firm-level technological issue, this study conceptualizes omnichannel readiness as a destination-level development concern, positioning it as a form of digital soft infrastructure in emerging tourism destinations.

3. METHODOLOGY

This study adopts a descriptive and exploratory case study design to examine the readiness of hotel distribution systems for omnichannel implementation in an emerging tourism destination. The descriptive design is used to map empirical booking channel performance, while the exploratory approach enables an in-depth assessment of system integration and managerial practices that are not fully observable through quantitative data alone. This approach is appropriate for investigating digital transformation and omnichannel readiness, which are context-specific and embedded within organizational and destination environments.

The research was conducted in Labuan Bajo, West Manggarai Regency, East Nusa Tenggara, Indonesia, a designated super-priority tourism destination under Indonesia's national tourism development program. The study period covers January to May 2025, which represents an early phase of post-pandemic tourism recovery and increasing international market penetration in the destination.

The target population of this study consists of hotel distribution activities within emerging tourism destinations in Indonesia. Using a purposive sampling technique, one upscale hotel, Bintang Flores Hotel, was selected as the research subject. The hotel was chosen based on three criteria: (1) its strategic position as one of the pioneering four-star hotels in Labuan Bajo; (2) its active engagement with multiple digital distribution channels, particularly Online Travel Agents (OTAs); and (3) its partial adoption of hotel distribution technologies, indicating an ongoing digital transition rather than full system maturity.

The selected hotel is treated as a representative case to explore omnichannel readiness challenges commonly faced by hotels operating in emerging tourism destinations. The study does not aim for statistical generalization, but rather for analytical generalization, whereby insights derived from the case can inform similar destination contexts.

This study utilizes both quantitative and qualitative instruments to assess omnichannel readiness. The main analytical construct is omnichannel readiness, operationalized through a five-dimensional Omnichannel Maturity Matrix adapted from multichannel and omnichannel marketing literature (Beck & Rygl, 2015; Sun et al., 2017; Verhoef et al., 2015). The five dimensions include: (1) Channel manager utilization; (2) Integration with the Property Management System (PMS); (3) Availability of a website booking engine; (4) Customer data management and Customer Relationship Management (CRM) capability; and (5) Consistency of customer experience across booking channels.

Each dimension is measured using a five-point ordinal scale, where: 1 = Absent capability; 2 = Initial (isolated or manual operation); 3 = Developing (partial integration); 4 = Integrated (system connectivity across channels); and 5 = Optimized (fully integrated omnichannel system). The scoring

criteria for each level were adapted from established omnichannel maturity frameworks and validated through managerial clarification during the interview process.

Two main instruments were used: (1) Operational Data Recording Sheet, used to extract and categorize booking data by channel type (OTA and offline Travel Agent/TA), monthly room nights, percentage contribution, and top-performing agents, and (2) Semi-Structured Interview Guide, used to assess internal system configuration, technological integration, and data management practices related to omnichannel readiness.

This study uses secondary and primary data sources. Secondary data were obtained from the hotel's internal operational records covering the period January–May 2025. The data include: (1) monthly room night bookings by OTA and TA; (2) percentage contribution of each booking channel to total bookings; and (3) monthly rankings of top booking agents based on room night volume.

Primary data were collected through a semi-structured clarification interview conducted with the hotel's operational management in June 2025. The interview focused on system usage and integration, including the channel manager, PMS, website booking engine, and CRM practices. This qualitative data serves to validate and contextualize the quantitative findings.

Quantitative data were analyzed using descriptive statistical techniques, including percentage calculation, trend comparison, and channel concentration analysis. These analyses were used to identify patterns of OTA dependency and distribution dominance. The omnichannel readiness assessment was conducted by assigning ordinal scores to each maturity dimension based on both operational evidence and interview validation. The resulting scores were visualized using a radar chart, which provides an integrated overview of strengths and gaps across readiness dimensions.

Qualitative interview data were analyzed using thematic interpretation, focusing on system integration, operational constraints, and customer experience consistency. The qualitative findings were triangulated with quantitative results to enhance analytical validity. Data processing and visualization were conducted using standard spreadsheet software, while the analytical framework was guided by previously published omnichannel maturity models. As the formulas used for percentage and trend calculations are standardized, they are not re-explained in detail.

4. RESULTS AND DISCUSSION

4.1 OTA Dependency and Distribution Concentration in an Emerging Destination

The analysis of booking performance data provides empirical evidence of distribution concentration patterns in the case hotel. The findings reveal a strong dependency on Online Travel Agents (OTAs) in the hotel's distribution structure, with OTA bookings accounting for an average of more than two-thirds of total room nights during the observation period. This pattern indicates that digital platforms play a dominant role in shaping market access for hotels operating in emerging tourism destinations such as Labuan Bajo. As shown in Table 1, Online Travel Agents (OTAs) contributed more than two-thirds of total room nights during the January–May 2025 period, indicating a high level of dependency on digital intermediaries. The concentration of bookings among a small number of global platforms is further illustrated in Table 2, where Booking.com and other major OTAs consistently dominate monthly room night contributions.

Table 1. Room Night and Percentage Contribution of OTA and TA (January–May 2025)

Month	OTA Room Nights	% OTA	TA Room Nights	% TA	Total Room Nights
January	492	67,21%	240	32,79%	732
February	395	64,23%	220	35,77%	615
March	550	63,88%	311	36,12%	861
April	1.178	70,24%	499	29,76%	1.677

Month	OTA Room Nights	% OTA	TA Room Nights	% TA	Total Room Nights
May	1.550	69,35%	685	30,65%	2.235

Source: Operational data of Bintang Flores Hotel, processed.

Table 2. Top 5 Sales Agents by Room Nights (January–May 2025)

Month	Agent (Type)	Room Nights	% Monthly
January	Booking.com (OTA)	166	32,42%
	Ctrip (OTA)	96	18,75%
	Dida Travel (OTA)	69	13,48%
	Traveloka (OTA)	63	12,30%
	Hotelbeds (OTA)	35	6,48%
February	Ctrip (OTA)	134	31,09%
	Booking.com (OTA)	120	27,84%
	Dida Travel (OTA)	56	12,99%
	Traveloka (OTA)	27	6,26%
	Destination Asia (TA)	24	5,57%
March	Booking.com (OTA)	307	48,04%
	Adhek Sport Fishing (TA)	68	10,64%
	Ctrip (OTA)	65	10,17%
	Agoda (OTA)	61	9,55%
	Afrilia Mega Wisata (TA)	33	5,16%
April	Booking.com (OTA)	500	39,31%
	Dida Travel (OTA)	195	15,33%
	Ctrip (OTA)	155	12,19%
	Traveloka (OTA)	145	11,40%
	Agoda (OTA)	93	7,31%
May	Booking.com (OTA)	503	29,69%
	Dida Travel (OTA)	323	19,07%
	Traveloka (OTA)	283	16,71%
	Trip.com (OTA)	246	14,52%
	Grand Circle (TA)	81	4,78%

Source: Operational data of Bintang Flores Hotel, processed.

From a destination perspective, OTA dominance reflects increasing global visibility and accessibility, particularly following the reopening of international flight routes. OTAs enable hotels in peripheral destinations to overcome geographical and informational barriers by connecting them directly with international markets. This result is consistent with previous studies indicating that OTAs significantly enhance market visibility and demand generation, particularly for hotels located in peripheral or less-established destinations (Law et al., 2015; Vinod, 2024). OTAs reduce information asymmetry and facilitate access to international markets, which is crucial during early stages of destination development. In this regard, the dominance of OTAs observed in Labuan Bajo reflects a common structural characteristic of emerging tourism destinations.

However, the concentration of bookings among a small number of global platforms (see Table 2) supports concerns raised by Knudsen et al. (2022), who argue that platform dominance can weaken hotels' strategic autonomy and data ownership. Similarly, Alhassan (2025) highlights that excessive reliance on OTAs may erode direct customer relationships and increase long-term distribution costs. The findings of this study extend these arguments by demonstrating that OTA dependency is not only a firm-level issue but also a destination-level challenge, as value leakage and data control limitations may affect the overall competitiveness of emerging tourism areas.

This finding indicates that OTA dependency in Labuan Bajo extends beyond a tactical distribution choice and reflects a structural characteristic of hotel operations in emerging destination, shaped by early-stage market conditions and platform-led growth dynamics. While previous studies highlight the efficiency gains associated with OTA use, the concentration observed in this study suggests a form of path dependency that may constrain strategic flexibility over time. In the context of an emerging destination, such dependency risks reinforcing asymmetrical power relations between global platforms and local accommodation providers. Consequently, high OTA dependency should be interpreted not only as a market outcome, but as an early indicator of limited omnichannel readiness that may influence destination-level competitiveness.

4.2 Fragmented Distribution Systems and Limited Omnichannel Readiness

Despite strong OTA engagement, the radar chart results indicate that the hotel's internal distribution systems remain fragmented, with limited integration between the channel manager, PMS, website booking engine, and CRM (see Figure 1). This configuration suggests a predominantly multichannel structure rather than true omnichannel readiness.

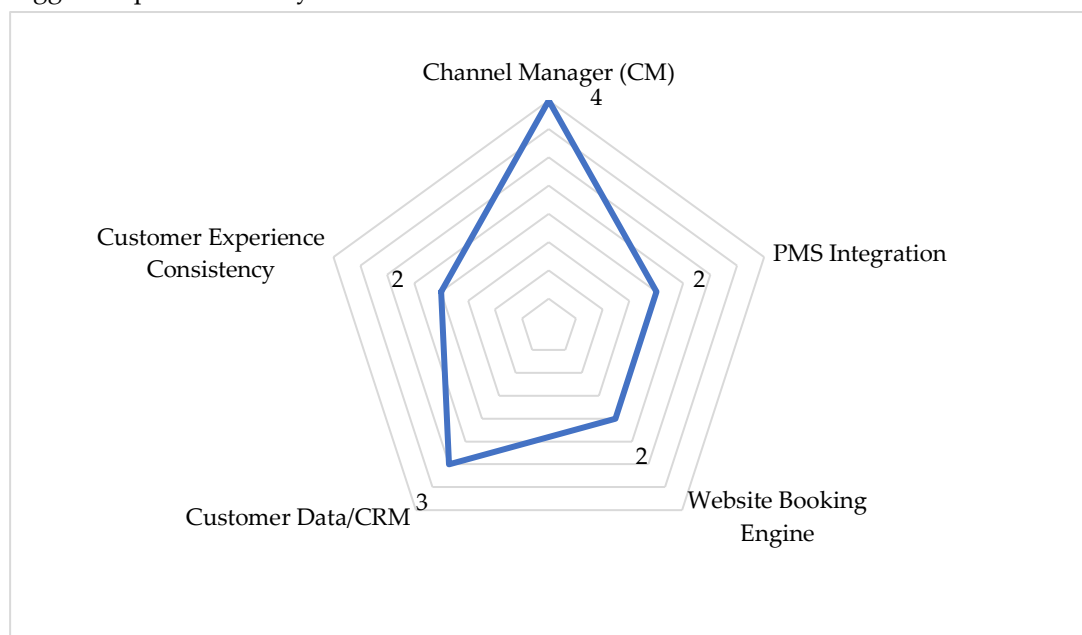


Figure 1. Omnichannel Maturity Matrix – Bintang Flores Hotel

Source: Primary data (semi-structured interview with hotel management, June 2025)

These findings align with the conceptual distinction made by Beck & Rygl (2015), who emphasize that omnichannel strategies require interoperability and coordination across channels rather than mere channel coexistence. Similarly, Verhoef et al. (2015) argue that omnichannel readiness depends on back-end system integration and unified customer data management, both of which remain limited in the case examined.

In the hospitality context, Buhalis & Leung (2018) note that fragmented technological systems hinder operational efficiency and prevent the delivery of seamless customer experiences. The present findings empirically support this argument by showing that, although digital tools are present, the lack of system integration constrains their strategic value. This suggests that digital transformation in emerging tourism destinations often progresses unevenly, with front-end platform adoption outpacing back-end system readiness.

The persistence of fragmented distribution systems highlights a critical gap between digital adoption and digital integration among hotels in Labuan Bajo. Although multiple

channels are actively used, the absence of interoperability between front-end platforms and back-end systems limits the realization of true omnichannel strategies. This finding supports arguments in the service and hospitality literature that multichannel presence does not automatically translate into omnichannel readiness. In emerging destinations, such fragmentation may delay the transition toward integrated digital ecosystems, thereby affecting both operational efficiency and customer experience consistency.

4.3 Implications for Customer Experience Consistency at the Destination Level

One important implication of fragmented distribution systems is inconsistency in customer experience across booking channels. The findings show that guests booking through OTAs generally receive faster confirmation and more standardized pre-arrival communication, as these processes are partially automated through platform systems. In contrast, direct bookings or reservations made via offline travel agents often involve slower response times and less consistent communication.

This finding corroborates the work of Rangaswamy & Van Bruggen (2005), who argue that multichannel environments lacking integration generate inconsistent customer journeys. In tourism and hospitality settings, experience consistency is particularly critical, as service encounters are inseparable from destination perception (Rather et al., 2022). Variations in pre-arrival communication and service responsiveness may therefore influence not only hotel satisfaction but also tourists' overall evaluation of the destination.

Furthermore, the absence of a centralized CRM system limits the hotel's ability to leverage customer data for personalization and post-stay engagement. Ashqar et al. (2023) emphasizes that CRM-driven personalization is a key determinant of loyalty in the hospitality industry. The findings of this study extend this perspective by suggesting that limited personalization capacity at the hotel level may weaken repeat visitation and destination loyalty, especially in emerging destinations seeking to establish long-term market presence.

From a destination perspective, inconsistent distribution and booking experiences across hotels may undermine efforts to deliver a cohesive visitor journey. The findings suggest that customer experience is shaped not only by individual service encounters, but also by the degree of alignment across digital touchpoints within the destination. In the absence of integrated omnichannel systems, visitors may encounter varying information quality, pricing structures, and booking processes, potentially weakening overall destination perception. This reinforces the notion that customer experience consistency is a collective outcome that depends on coordinated digital readiness among accommodation providers.

4.4 Omnichannel Readiness as a Destination Development Issue

The findings of this study position omnichannel readiness not only as a firm-level managerial concern but also as a destination development issue. In emerging tourism destinations such as Labuan Bajo, hotels serve as frontline service providers whose digital capabilities directly influence destination performance, value creation, and visitor satisfaction.

This perspective aligns with Buhalis & Leung (2018) ecosystem-based view of smart hospitality, which emphasizes interconnectivity and interoperability among tourism stakeholders. Similarly, Pansari & Kumar (2016) argue that sustainable competitiveness in service industries increasingly depends on integrated customer engagement systems rather than isolated technological investments.

In the context of Indonesia's emerging tourism destinations, limited omnichannel readiness may reinforce dependency on global intermediaries, reducing local value capture and strategic flexibility. Viewed through a destination development lens, these findings reveal that digital integration challenges extend beyond firm-level decision-making and are

closely linked to destination governance structures. The absence of shared digital standards and coordinated support mechanisms in emerging destinations such as Labuan Bajo may hinder collective progress toward omnichannel maturity. Therefore, destination management organizations and local governments should consider digital capability development as an integral component of tourism governance, including support for system integration, digital skill enhancement, and data management practices. By positioning omnichannel readiness as a destination-level concern, this study bridges hospitality distribution management with destination development discourse and highlights its relevance for long-term competitiveness and sustainable tourism management in emerging tourism contexts.

5. CONCLUSION

Based on these findings, several practical and policy-oriented recommendations are proposed. First, hotel operators in emerging destinations should prioritize system integration across digital distribution channels. Improving interoperability between PMS, booking engines, channel managers, and CRM systems would enable more consistent customer interactions, enhance operational efficiency, and support data-driven decision-making. Gradual investment in omnichannel capabilities can also reduce excessive dependency on global intermediaries and strengthen direct booking performance.

Second, destination management organizations (DMOs) should recognize omnichannel readiness as part of destination service quality management. Capacity-building programs, technical assistance, and knowledge-sharing platforms can support hotels, particularly small and independent properties in improving digital distribution capabilities. Such initiatives may help align service standards and customer experience across the destination.

Third, from a tourism policy perspective, the findings suggest that digital distribution readiness should be incorporated into destination development frameworks as a form of soft infrastructure. Beyond physical development and promotion, policymakers should consider incentives for system integration, digital skill development, and data governance at the local level. Strengthening omnichannel readiness may contribute to reducing value leakage to global platforms and improving local value capture in emerging tourism destinations.

Overall, positioning omnichannel readiness within tourism governance can support more sustainable and resilient destination development, particularly in destinations undergoing rapid tourism growth such as Labuan Bajo. Ultimately, strengthening omnichannel readiness at the hotel level can serve as a strategic lever for enhancing destination-level service integration, experience consistency, and sustainable tourism development in emerging destinations such as Labuan Bajo.

This study has several limitations that should be acknowledged. First, the empirical analysis is based on a limited number of hotel cases within a single emerging tourism destination, which restricts the generalizability of the findings. Second, the assessment of omnichannel readiness relied partly on interview-based scoring, which may involve subjective interpretation despite efforts at triangulation with operational data.

Future research could expand this study by examining larger samples across multiple emerging destinations to enable comparative analysis. Longitudinal studies may also provide insights into how omnichannel readiness evolves alongside destination development. In addition, incorporating customer-side data would allow further exploration of the relationship between omnichannel readiness, experience consistency, and destination loyalty.

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