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FROM HIGH STREET TO DIGITAL ENVIRONMENTS – CHANGING LANDSCAPES IN TRAVEL INTERMEDIATION

Jarmo Ritalahti

Introduction

The internet and electronic market places have changed the travel services industry completely, and traditional travel intermediaries grapple with the question of what the reason for their existence is in an environment where an overwhelming amount of information is available, and transactions can be conducted directly between buyers and sellers on the Internet (Novak & Schwabe, 2009). Although different authors have already pointed out the need for traditional travel intermediaries to reposition themselves in the market place by adding value to the services they offer clients and by acting as more than just mere ticket reservation offices (Dilts & Prough, 2002; Alamdari, 2002; Cheyne, Downes & Legg, 2005), little research has been conducted in the last years identify these value-added services desired in the market, and the skills and competencies that traditional intermediaries require to deliver these services. While several studies have tried to predict the future of traditional travel intermediaries (e.g. Castillo-Manzano & López-Valpuesta, 2010) careful consideration must also be given to the actual skills and competencies that intermediaries will need in the future to re-main viable and competitive.

The development and adaption of information and communication technologies have generated the development of online purchasing on the Internet. Online shopping allows the sales 7/24 that makes both selling and purchasing independent of physical spaces. The evolution of consumer behaviour on the Internet undergoes similar stages to those on more traditional channels. It begins with the adaption or the first purchase, continues with the acceptance of the channel through the first re-purchases, and end when online purchases become an everyday routine. Once the consumer has made at least one purchase online, the acceptance of the new channel is stronger. From the seller's side, it is important to understand the different consumer and purchasing behaviour between consumer groups. In the competition between online and high-street travel agencies consumers sometimes prefer to purchase air tickets in traditional travel agencies. This preference is based especially on security concerns when purchasing online, reliability and user friendliness by travel agents. For online purchasing speaks round-the-clock availability, rapid response time, and easiness of use.

This draft discusses about the challenges traditional high-street travel agencies and tour operators are facing now in a fast chancing operational environment. The aim is to point out a few challenges to better understand the depth of the change that has shaken the intermediation industry already for over a decade.

Travel intermediation

The term intermediary can be defined as any dealer who acts as a link in the chain of distribution between the company and its customers (e.g. Lubbe, 2000). In the tourism industry, travel agents and tour operators are considered as intermediaries or distributors. Though, the line between a travel agency and tour operator is very thin or invisible today, traditionally a travel agency can be regarded as a retailer and tour operator as a wholesaler. According to Lominé and Edmunds (2007, 194-195) a tour operator pre-arranges and distributes/sells holidays to public. Originally, they were packages, but now more also tailor made. A travel agent offers for sale products and services created by tour operators, cruise lines, airlines, trains and ferry operators. Travel intermediaries main task is to bring buyers and sellers in the field together and reduce transaction and supply/ownership costs between buyer and seller, instead of completely eliminating an intermediary (such as a distributor). Possible benefits of travel intermediaries for suppliers are that they are able to sell in bulk and might also be able to take a certain risk instead of suppliers when selling travel services to end users. Especially tour operators can be tied to contracts with suppliers. Furthermore, intermediaries take also part in promotion of services. Consumers or end-users benefit by avoiding search and transaction costs, especially when purchasing inclusive or package tour, and gaining from specialist knowledge of a tour operator. When buying a package, consumers might also often gain from lower prices. Today, the benefits of traditional travel intermediaries are not any more that obvious.

The use of travel intermediaries by suppliers, such as hotels, will result in the loss of margins and in the loss of influence in the distribution process. According to Scaglione and Schegg (2016) the online intermediaries have also a huge market knowledge as they are able to collect e.g. insight in customer behavior. For the consumer, choice may be reduced, and prices increased, especially with the further concentration and consolidation of travel intermediaries.

Traditionally, independent travelers often put their own itinerary together. They could do so by purchasing accommodation or transport directly from suppliers, from their own outlets or via travel agent. It was common for domestic travelers to purchase their trip directly because they usually had good product knowledge and ready access to phone or internet to make reservations (e.g. Cooper,

Fletcher, Fyall, Gilbert & Wanhill, 2005). It was common for airlines, bus and shipping companies to have their own outlets in large cities where the public could purchase their travel products directly. Furthermore, call centers became very popular amongst airlines to handle customer requests. Retailers such as travel agents sold individual components of a trip, transport tickets, accommodation, excursions, but they might also put their own brand of tours together. The most common way of distributing foreign holiday travel in Europe was through inclusive tours packaged by tour operators and sold by travel agents. Some holiday packages were sold directly by tour operators. This will not continue, especially due to the technology revolution and new alliances with different actors and stakeholders in travel intermediation.

According to Zeljko Trezner (2012), a member of Incoming Tourism Working Group of ECTAA (The European Travel Agents' and Tour Operators' Associations) travel intermediaries are not just intermediaries; they act as an interface between supply and different segments of demand. They are able to create a new demand or to expand the present demand. Furthermore, consumers tend to make greater use of travel agents and tour operators when purchasing complex products or travelling to remote destinations. He defines a complex product as package travels, package holidays and package tours, as well as excursions and events. Remote destinations are overseas markets and also distant European markets. Modern travel intermediaries have many different forms and very complex relationships. In tourist destinations, they cooperate with handling agents, ground operators, consolidators, wholesalers, inbound tour operators, and destination management companies. In outbound market their partners can be travel management companies, consolidators, wholesalers, outbound tour operators, travel agents, retail chains, on-line travel agents, and home based travel agents to name a few (Trezner 2012). According to Rossini (2015) emerging players in the online travel intermediation are technology companies like Google and TripAdvisor.

Distribution is one of the most crucial factors for the competitiveness of tourism organizations. It serves as the link between various tourism suppliers and customers, individual tourists and organizations. In tourism, the distribution system is complex and multi-faceted, as often multiple distribution channels are used by tourism organizations. Tourism distribution channels vary according to the type of products and countries (Buhalis 2001 in Buhalis & Laws 2001, 7). Most distribution channels, though, share the functions of providing information to prospective customers and making travel arrangements. Pearce and Taniguchi (2008) state that distribution is recognized as a critical source of competitive advantage in the marketing mix. Multichannel distribution systems involving a mix of direct and indirect channels are frequently used by tourism businesses to extend coverage,

respond to preferences of different market segments, reduce costs, and take advantage of technological change (Pavlides 2006).

The information communication technology (ICT) has revolutionized distribution channels in tourism. With the information function being to a larger extent transferred over the Internet, and the travel arrangements being performed by the automatized computer systems, travel agencies have faced the challenge of positioning themselves in the tourism distribution system and competing with the tourism suppliers over the customers. Already a decade ago many authors pointed out the need for travel agencies to re-asses their core competencies and concentrate on value-added services that go beyond bookings and ticketing (Buhalis & Laws 2001, 329; Cheyne, Downes & Legg 2005, 44).

Services

According to Zeithaml, Bitner and Gremler (2009, 4) "services are deeds, processes, and performances provided or coproduced by one entity or person for another entity or person". The importance of services and service providing industries has grown fast or even phenomenal in the last decades especially in the industrialized western countries (Voudouris, Owusu, Dorne & Lesaint 2009, 1). To manage services, service operations, and/or service chain is vital when aiming at productivity growth and a cost advantage over competitors. Daniel J. Flint (2010) states that consumers purchase (service) products because they help them to solve problems. Thus, every service that is purchased is serving a customer – every service should always serve value creation for a consumer or customer. Customers or end-users do not buy services, they buy the benefits services can provide them with: Services mean supporting customers' activities and processes. The value of services is created in a value-generating process when an end-user makes use of the solution he/she has purchased. (Grönroos 2007, 4.) Voudouris et al. (2010) describe services as following: Services are intangible, they cannot be seen, tasted or touched like tangible goods. Services are heterogenous because no producers nor end-users are similar. The human interaction makes the difference. Services are simultaneously produced and consumed. Services are as well perishable, they can't be saved, stored, returned, or inventoried.

Service chain management is planning and management activities that range from support functions to the delivery of end-user services. In service chain management, the digitalization of services introduces efficiencies in the design and delivery of services. It also allows international commerce and purchasing. A structure of a digital service chain can include following steps: Content Creation

(e.g. company software, computer games, movies, and music); Aggregation (gathering together digital data into a useful collection like an image gallery; Distribution (a networked computer platform where the data is placed. The platform uses a distribution system to manage delivery to users); Data Transport (a mobile network and broadcasting platform to transfer data); Digital Experience (The digital service is experienced on different devices). (Voudouris et al. 2010, 14-16.)

Also, the retailer environment for services is changing: It has turned to much more complex because of customized programmes that have been designed for joint, often very different, seller and retailer partnerships. Furthermore, retailers must sharpen their brands, to differentiate from the competitors. There is requirement of unique store identities. The differentiation of the stores, creating a brand, is not only the duty of the retailers. The work should include also members of the supply chain. (Flint 2010.) A tourism supply chain as a distribution system focuses on the distribution of tourism products to end-users, tourists. But it concerns cooperation as well or preferably collaboration and even competition with the organisations in the system. (Yang, S. Q. Huang, H. Y. Song & L. Liang 2009). A tourism supply chain includes and involves the suppliers of all tourism goods and services that are delivered to the end-user (Huan, Song, Huang & Lou 2012, 717).

Changing consumer behavior

Consumer behavior has been researched for decades. It consists of psychology, economics, sociology, anthropology and neuroscience. It has always been a marketing landscape mostly with business-to-consumer (B2C) ways of thinking. However this has changed with internet and social media to more consumer-to-consumer (C2C) controlled marketing. Consumers are participating, taking active roles in various marketing functions. Marketing and influencing by recommendations, word of mouth, mobile, or so called connected marketing is more powerful than ever (Kimmel 2010, 3-5).

The market environment of today where travel services are bought and sold has undergone tremendous changes. These changes are mostly based on megatrends like ageing population, globalization and sustainability, to name a few. Vejlgaard (2008, 20-22) describes megatrends as cultural, economic, political, or technological changes or shifts that are just about to happen. The implication of these megatrends will affect all or almost all society. According to him, megatrends last longer, they have impacts on many different fields of society, and they involve a complex process that often includes politics, economy, and technology. Trends can be differentiated based on the time frame and

the impact scale to megatrends: globalization, demographic change, information society and individualism; societal trends: awareness, aging societies, tolerance and equality and other); and consumer and lifestyle trends: ethical consumption, youth invasion, metrosexuals, soft hedonism and others (Veikkola 2004).

Megatrends and trends have their impacts in consumer behavior, and also in purchasing behavior. Generally, consumers or individuals act in their own interest. They buy or purchase for personal consumption or to meet the needs of the family or household unit. Consumer behavior scholars have tried to build a model for consumer decision-making and consumer choice by emphasizing that the behavior is preceded by information processing. So, the stages in purchasing process are, according to Satyanarayana (2013, 469) following: brand recognition; attitude to that brand; confidence in the brand; intention to purchase; and purchase itself.

According to Quinton & Harridge-March (2008, 78-80) consumers develop an impression about the seller from their whole experience both in a real or virtual retail environment. They also state that when purchasing offline the important factors are people working at retailers, impression and reputation of the brand, added value given, and possibility to use multiple channels. Furthermore, when purchasing online, the important factors are purchasing process, people, and impression and reputation. So, consumers are influenced by different factors or elements when purchasing, in this case wine, in real and virtual environments.

In retail and travel business, loyalty programmes have impacts on purchasing behavior. A loyalty programme is an integrated system of marketing actions that aims to make customers more loyal by developing personalised relationships with them. The principle purpose of loyalty programmes is to select, identify and segment heavy users who are sensitive to targeted promotions or certain product categories and thereby provide an improved allocation of resources (Meyer-Waarden 2008). According to Reichheld (1996) loyalty programmes have two effects on purchasing behaviour: differentiation loyalty and purchase loyalty. Differentiation loyalty decreases the degree of sensitivity customers have towards competing offers or prices and thereby prompts customers to pay higher average process for goods they usually purchase, buy them in higher quantity or choose better quality products and/or more expensive brands. To summarize, loyalty programmes help to take consumers' minds off the price. According to Meyer-Waarden (2008) loyalty programmes have impacts in purchasing behaviour among programme members. Programme members have much

higher purchasing intensities, share of purchases, purchasing frequencies and inter-purchasing times than non-members.

In recent years, the development and adaption of information and communication technologies have generated the development of online purchasing on the Internet. Online shopping allows the sales 7/24 that makes both selling and purchasing independent of physical spaces. The evolution of consumer behavior on the Internet undergoes similar stages to those on more traditional channels. It begins with the adaption or the first purchase, continues with the acceptance of the channel through the first re-purchases, and end when online purchases become an everyday routine (Hérnandez-Ortega, Jiménez-Martínez & Martín-DeHoyos 2008). Hérnandez-Ortega et al (2008) have defined three different categories for e-customers that are potential shoppers, new shoppers and experienced shoppers. The results of their study show that there are significant differences in the purchasing behavior of the different groups when consuming online. E.g. the first, and inexperienced group emphasizes the importance to the Internet use and satisfaction as well as the easy use of the online shop. Once the consumer has made at least one purchase online, the acceptance of the new channel is stronger. The individual who makes his/her first purchase wants the process to be simple. From the seller's side, it is important to understand the different consumer and purchasing behavior between the three consumer groups based on their experiences in online buying.

Already over 10 years ago Athiyaman (2002) studied the competition between online and high street travel agencies and found out that consumers preferred to purchase air tickets in traditional travel agencies. This preference was based especially on security concerns when purchasing online, reliability and user friendliness by travel agents. For online purchasing spoke round-the-clock availability, rapid response time, and easiness of use. Law, Leung and Wong (2004) summarize that travelers perceive services provided by high street travel agencies important. Furthermore, they go on that travel agents should be aware and positive towards the fast changing distribution environment. Lastly they see that travel agencies should not see Internet as a threat, but as an opportunity to offer added-value services that could not be done earlier. The very fast growth of online shopping has changed also attitudes to purchase travel products online, so the results of studies from the beginning of this millennium are perhaps not anymore so valid.

The virtual market space is still new to many consumers and the knowledge of collective consumer experience is missing. The growth of e-tailing or purchasing online has not been as fast as forecasted due to e.g. the missing trust by consumers who can still be suspicious of online retailers

(Durkan, Durkin & Gillen 2003). It seems that trust is more important in the virtual world than in the physical (McCole 2002). According to Nicholson, Clarke and Blakemore (2002) the inter-personal liking is essential in the development of trust in long-term channel relationships. They go on that inter-personal liking is impossible in the virtual business environments due to the lack of physical proximity, visual contact and social interaction. Furthermore, the international nature of the Internet makes the consumer protection issues confusing. Trust is of critical importance for Internet retailers (Einwiller, Geisler & Weill 2000).

Decision-making process and the factors that can have an effect on whether or not a customer makes a purchase are complex. Understanding what motivates consumers to buy a product or a service is crucial in ensuring that those features and benefits they wish to have, are found in our product or service. The fundamental factors that influence a consumer's purchase behavior can be divided into two categories: psychological and sociological. Psychological factors are those like needs, drive, motivation and goals. Maslow's hierarchy of needs (physiological, safety, social, egoistic and self-actualization) can be explained in short that before one is able to fulfill higher-level needs, the lower-levels must be satisfied. When a lower-level need is satisfied it works as a motivator to reach for the next level. By Blythe (2013) needs are a lack of something that motivates us to change. He also argues that as in the wealthier countries as the basic survival needs have been already met, consumers tend to concentrate to more in pleasing (hedonism) and fun things that satisfy them. Drive is the basis of motivation and acts like the force that stimulates our need to close the gap between an actual state and desired state of being. For example being thirsty would be the actual state and desired stated would be not thirsty, so one is motivated to drink to fulfill the need. (Blythe 2013, 28-32; Schiffman & Wisenblit 2015, 82-92.)

Motivation is what drives consumers to buy as a motive is the reason for carrying out a particular behavior. Motives can be classified in different dimensions that affect the end result. Primary motives are reasons leading to e.g. buying a new car due to the old one being unreliable. Primary motives include rational motives (reasoning and logical thinking which car to buy) and conscious motives (awareness of needing a new car). Secondary motives are attached to buying a certain brand. Emotional motive would be feelings about a certain car brand. Dormant motives are below conscious level, e.g. a wish to buy a sports car can be subconsciously linked to middle-ageing. (Blythe 2013; Schiffman & Wisenblit 2015, 82-92.)

The Engel, Kollat and Blackwell consumer decision process (CDP) referred to by Blythe (2013) consists of seven stages that drive the consumers' decision. Before the process an individual is affected by drives, desires and situational factors and they start to guide behavior. First stage is in which a need is recognized. In the second stage a consumer is searching for information, either from their own memory or experiences (internal) or from external sources such as the internet. The pre-purchase evaluation stage is in which the alternatives are considered. The final purchase is happening on the fourth stage. Consumption is the fifth stage in which a consumer is fulfilling the original need that started the process. Post-consumption evaluation is where an individual is considering was the need satisfied or not. Last, seventh stage is divestment in which the product is disposed or anything that was left from the consumption. (Blythe 2013, 273.)

Schiffman and Wisenblit (2015) have divided the decision-making process into three levels; input, process and output. In the input level the factors that influence the consumer's decisions are based on the company's marketing regarding product, its price and promotion, and where it is sold. Sociocultural influences such as family and friends, social class and cultural entities also have an effect in the input level. The method by which information is received from a company or sociocultural sources are present as well at the input level. (Schiffman & Wisenblit 2015, 47.)

The process level is about how consumers make decisions. The psychological factors affect how the marketing efforts and sociocultural aspects influence the recognition of a need, pre-purchase search for information and evaluation of alternatives. The evaluation creates experience which turns into a part of consumer's psychological factors by the process of learning. The output level is in which a consumer decides whether the purchase was right and possibly makes a new purchase. (Schiffman & Wisenblit 2015, 47.)

The virtual market space is still new to many consumers. The growth of e-tailing or purchasing online was not as fast as forecasted over a decade ago due to e.g. the missing trust by consumers who could still be suspicious of online retailers (Durkan, Durkin & Gillen 2003). It seems that trust was more important in the virtual world than in the physical (McCole 2002). According to Nicholson, Clarke and Blakemore (2002) the inter-personal liking was essential in the development of trust in long-term channel relationships. They go on that inter-personal liking was impossible in the virtual business environments due to the lack of physical proximity, visual contact and social interaction. Furthermore, the international nature of the Internet made and makes the consumer protec-

tion issues confusing. When the Internet has become the most important sales medium for the majority of tourism and hospitality companies (Starkov 2010), traditional intermediaries have been facing huge challenges trying to survive in the fast changing operating environment. How can their business stay sustainable? Is it possible to talk about economic responsibility in traditional intermediaries business activities? When consumers need to book accommodation, the Internet provides a convenient platform to assess value offered, without interacting with a hotel or intermediary representative (Varini, Scaglione & Schegg 2011). One can say that the Internet generated not only a paradigm shift, but an actual change in the operational practices in the tourism and hospitality industry (Buhalis & Law, 2008; Ip, Leung & Law, 2011).

Already in 2002 Kasavana and Singh as well as O'Conner and Frew stated that online distribution was seen as a shift away from traditional sales channels. Even though technology-mediated reservation represented already in 2002 a large part of i.e. hotel reservations (O'Conner & Frew, 2002), there is no evidence that travel agency-mediated reservations would be declining (Grönflaten, 2009; Hong-bumm, Seonok & Hye-young, 2012). The growth of travel agency-mediated bookings is based on the growth of online travel agencies, which started their operations already in the 1990's. Kracht and Wang (2010) point out that development in ICT have not reduced the number of intermediaries, but have resulted in a more complex network of intermediaries. Online intermediaries are now more powerful and also relevant to tourism suppliers (Morosan & Jeong, 2008).

Egger (2005) stated that when travel distribution increases more on the Internet, the number of high street or location-based travel agencies is decreasing. Intermediation is moving towards disintermediation which means the elimination of the intermediary or middlemen by using the Internet. Even though Internet enhances disintermediation, it also gives travel agencies the opportunity to re-intermediation, the use of Internet to survive in the more competitive environment (Bennet & Lai 2005). According to Zehrer and Möschl (2008), there was still much debate and speculation on how the Internet and its use had impacted the established intermediation industry. They went on saying that high street agencies see themselves confronted with strategic challenges. They must rethink their business models and distribution channels, because the modern information and communication technologies enable the majority of travelers to gather information and book services independently and on their own. Cheung and Lam (2009) state that traditional intermediaries can sustain their positions in the market by re-intermediating and reinvigorating their business strategies in the emerging marketplace. Apart from securing the ownership of necessary co-specialized assets, traditional

travel agencies have to acquire new electronic commerce technologies to reconfigure themselves to EC-able intermediaries to preserve the advantages that they have built.

Conclusions

According to the literature review of travel intermediation, service and consumer behavior in this draft the challenges of the traditional travel agencies and tour operators face are several. It is not only about supposed added-value that a high-street travel agency might be able to supply to the customers. The main challenges are more linked e.g. to the megatrends and trends that have impacts on all of us as well as industries. The world is getting older, more urbanized and middle class, and the technology is developing faster than ever. These megatrends steer the consumer and purchasing behavior of customers. When the service supply is available 7/24 on the Internet that is manageable to most of us, where do we need face-to-face contacts. Online shopping is easier and safer than before, and consumers trust on online shopping has increased. It is very normal, almost a daily activity to many of us. Another challenge is the understanding the importance of service to end-users. Services are purchased to fulfill a need or needs not only travelling somewhere. The added-value comes from the fulfillment of the needs. The third challenge facing traditional travel intermediaries is the decreasing customer loyalty. Customer, and especially purchasing behavior is more polarized than ever. One day five-star services, and the other day two-star services. Travelling is so banal that one doesn't need to show off anymore. Furthermore, travelling is also so frequent that a consumer doesn't need to do purchases only at one service supplier.

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