

TOWARDS THE INFOMEDIATION IN TOURISM

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ABSTRACT

The purpose of the study is to analyse the changing role of tourism intermediaries in the distribution chain. Globalisation and the development of ICTs have undoubtedly changed both business practices and strategies as well as industry structures. They are also creating new rules governing competition within the tourism market. However, the idea of disintermediation to which e-commerce specialists often refer does not necessarily mean destruction of travel intermediaries. By examining their traditional functions one can demonstrate that current Internet trends go beyond disintermediation in tourism. Emerging new Internet players are being joined by entirely new types of intermediaries, leading to the radical restructuring of tourism value nets.

Introduction

Developments in ICTs have undoubtedly changed both business practices and strategies as well as industry structures (Porter, 2001). Globalisation and the development of the ICT are creating new rules governing competition and designate the beginning of a Net Economy. While the Internet is an important new channel for commerce in a wide range of industries, it is especially relevant to tourism activity. The purchase and consumption of a tourism

product is spread over time and distance (Kachniewska, 2013) thus tourism products cannot be examined before traveling and all the purchase decisions are based on the information accessible for a tourist. Due to the same reasons, gathering and processing information about tourists is extremely complicated for SMEs and destinations. Thus, an independence and an easy access to information constitutes one of the priorities to both: modern tourists and tourism vendors (Laesser and Jäger, 2001; Buhalis, 2003).

Tourism industry has been strongly influenced by the ICT growth, which affected the change in the marketing strategies of tourism regions and companies. Hospitality industry has historically been an early adopter of new technology: the establishment of the Computer Reservations Systems (CRSs) in the 1970s and Global Distribution Systems (GDSs) in the late 1980s, followed by the development of the Internet in the late 1990s and the emergence of mobile services at the beginning of the XXI century, have transformed the best operational and strategic practices in the industry (Buhalis, 2003; Kachniewska, 2014a).

Newly configured systems are leading to the transformation of industries. Conventional corporate models of destinations and SMEs may generate negative results. The borderlines between the industries within tourism are dissolving and the scope of companies' activities is changing. New forms of cooperation and new forms of governance in tourism value chains are required. "Unless the tourism industry improves its competitiveness, by utilising the emerging new technologies and innovative management methods, there is a danger for exogenous players to enter the marketplace, jeopardising the position of the existing ones" (Buhalis, 2003).

The purpose of the study is to analyse the changing role of tourism intermediaries in the distribution chain in Poland. Digital delivery of travel and tourism services and the development of e-commerce and m-commerce have dramatically restructured global tourism value chain and undermined the role of travel intermediaries on the global level. The main goal of the research paper is to analyse potential and drivers of digital delivery of tourism services in Poland and to explore the process of disintermediation and re-intermediation within the tourism market. The paper is of theoretical and empirical character: it identifies tourism experts' and entrepreneurs' opinions on the usability and development potential of digital delivery in Poland. Its main thesis is the inevitability of the decrease in the number and importance of Polish travel agencies according to the model of western tourism markets. On the basis of the respondents opinions and the literature review the potential quality transformation of the tourism intermediation market were outlined: new entities emergence, new forms of partnership and industries interpenetration, and new data analysis capabilities. The paper seeks to focus on the idea of "infomediation" and explores the threats and opportunities that the emergence of the Internet presents for the industry. Understanding the impact of e-commerce requires an analysis of how the tasks and functions of traditional economic actors are being rebuilt. By examining traditional functions provided by Polish tourism intermediaries it is possible to demonstrate that current Internet trends go beyond disintermediation. Emerging new Internet players are being joined by entirely new types of intermediaries.

The foundation for this paper was laid during a well-attended 21st International Travel Show "TT Warsaw 2013" (Tourism and New Technologies..., 2013). The research was started during the Experts Group Meeting. A structured mindmapping technique (The Futures Wheel) was used. The roundtable discussion covered observations of specialists with a different interest on the matter (university teachers, tourism industry leaders, new-tech experts).

The concept of tourism product: from value chain to value net

Unlike other products offered by manufacturing or service companies, tourism products are heterogeneous: they are complex and consist of plenty of complementary components provided by suppliers from various public and private sectors. As an economic phenomenon, the tourism industry essentially represents a consolidation of related economic and non-economic entities. "Tourism is the sum of relationships arising from the interaction among tourists, business suppliers, host governments, host communities, origin governments, universities, community colleges and non-governmental organizations, in the process of attracting, transporting, hosting and managing these tourists and other visitors" (Reid, 2003). Majority of tourism organizations provide only one or several components of the total tourism product that is consumed during the course of the complete tourism experience, while tourists base their judgments on the satisfaction with an overall vacation experience.

Traditionally the various tourism industry players and their respective roles in the value chain covered final service providers, inbound tour operators, outbound tour operators, travel agents and reservation systems. Whereas in the past the boundaries between different players in the market were clear, vertical and horizontal integration in the tourism sector has resulted in a blurring of these boundaries (Kachniewska, 2006). ICT occurred to be additional strong transformation driver. Moreover, contrary to the classic model of an (industrial) value chain, (tourism) services are generated in the form of a chain that is a process with a sequence of activities directly aimed at customers. A tourism company must not only be in a position to coordinate its internal network but must also create (and permanently extend) skills which enable it to function adequately in an external network. The consequence and expression of this development is a fragmentation of the entire service provision process. The entire processes (which will ultimately make up a tourism offer) are provided in a network involving various companies and other entities.

All the processes mentioned above are accompanied by particular changes on the demand side. Contemporary tourists, or the "postmodern tourists", look for the possibility to compose their tourism packages personally and to modify them during the trip according to their personal needs and interests (Stockdale, 2007; Kachniewska, 2011) thus becoming Toffler defined prosumers (Toffler, 1970). As the advanced tourists often change their itinerary during the trip and quite often mix business or education with tourism (*bleasure* and *edutainment* trends), they are not likely to invest a great deal of time to pre-plan a travel schedule in detail (Kachniewska, 2014b). For the reason they need pragmatic and logistic information within an easy reach (available anytime and anyhow) during their travel. New players in the market create customer value with the support of mobile technology.

On the one hand the postmodern tourists' requirements constitute a new challenge for destinations and company marketers. Simple web sites and old-school CRM systems no longer provide organisations with marketing tools which could meet requirements of advanced tourists or provide them with adequate and sufficient information. On the other hand, once having access to new marketing technologies, the marketers gain a unique chance to get information about tourists' needs and habits, to affect their buying behaviour and provide them with the customised information on destinations. The value proposition is no longer offered by a company alone: it is composed of many elements, including the active participation of (potential) tourists. Itinerary is modified even during the travel.

Business activities increasingly aim not only to add value but also to reinvent value, thus turning away from the isolated perspective of positioning a fixed set of activities. In strategic analyses, in particular, this forces companies to focus not only on themselves or their industry, but to start out from an actual value-creating system which involves various economic players such as suppliers, business partners and customers. Information and communication

technologies (ICT) have created innovative ways for providing value to clients. The adoption of mobile devices has grown tremendously and their characteristics of mobility and connectivity support on-demand services that are tailored to users and their specific situations. With the advent of Web 2.0 digital systems became collaborative, bringing a social layer to the Web. Marketing activities move from professional marketers to virtual communities and companies lose much portion of their control over the marketing communication.

The main strategic task of every company is thus a reconfiguration of roles and relationships in the players' existing constellations: traditional value chain does not reflect the real situation in contemporary tourism product creation process. As the new model is based on the Internet and world wide web solutions, Bovet and Martha (2000) call it "value net" and define it as "a business design that uses digital supply chain concepts to achieve both superior customer satisfaction and company profitability. It is a fast, flexible system that is aligned with and driven by new customer choice mechanisms. A value net is no longer just about supply – it's about creating value for customers, the company and suppliers" (Bovet and Martha, 2000). Similar approaches have been discussed as the Value Web Model (Selz, 1999) or the Value Constellation Model (Norman and Ramirez, 2000). However Laesser and Jäger (2001) claim that all the approaches are inspired by the same basic idea – the dissolution of the traditional value chain, cooperation between industries at various levels, and the involvement of customers in the provision of the service.

The impact of the Internet on tourism distribution channels

In contemporary markets, the disparities inherent in mass production and mass consumption have caused intermediaries to enter into the distribution chain between buyers and sellers. The need for intermediation in tourism, historically was even stronger: it was necessary to match tourism generating markets and distant destinations, to close the information gap and to bundle distracted services and attractions into a tourism package.

In 1958, Alderson argued that intermediaries provide economies of distribution by increasing the efficiency of the process. He summarised the importance of distribution, stating that the goal of marketing is the matching of segments of supply and demand. What makes distribution strategy unique *vis-a-vis* other marketing-mix decisions is that it depends almost entirely on physical location. Intermediaries fulfil three basic functions: they support economies of scope by adjusting the discrepancy of assortments; they routinise transactions (minimise costs, ensure standardisation, easier comparison and assessment); they facilitate the searching processes of both producers and customers by structuring the information essential to both parties.

The emergence of world wide web questions the future existence of tourism intermediaries. Although Buhalis (2003) gives some arguments against the disintermediation process in tourism distribution channel, majority of them seem to be justified only in short term ("technology is difficult to use and expensive to acquire for individuals", "a large part of the market is computer illiterate", "the more complex computers and the Internet become, the more people need experts to use them", "electronic intermediaries primarily serve the business market and are more expensive", "travel agencies offer a human touch and a human interface with the industry") and gradually disappear with the advent of new, digital-native generations.

Some arguments demonstrate intermediaries' ability to offer value, however the traditional sales points seem not necessary to supply the value to customers and vendors (free counselling services, giving advice, better prices through the right channels and deals, reduced insecurity of travel, better prices by buying in bulk). There are numerous arguments for Internet intermediation (including online travel agencies and customers' social forums):

experienced travellers are much more knowledgeable than travel agencies; visiting travel agencies is inconvenient, time consuming and restricted to office hours; commissions to travel agencies increase the total price of travel products, electronic travel intermediaries offer flexibility and more choice (Buhalis, 2003; Kachniewska, 2014a).

It is clear that the Internet has the potential to transform and even obliterate some distribution channels, the more that advances in wireless communications have made the Mobile Web a reality. It is the response to the need for anytime, anywhere access to information and services. No longer does a consumer want to wait for an agent to open, to drive there, to look for a salesperson who is generally ill-informed, and then to pay over the odds. Tourism offers and prices can be compared on the Web and lots of information can quite easily be gleaned.

The Internet is anticipated to change the role of both types of tourism mediation: tour operators and travel agencies. The emergence of dynamic packaging threatens tour operators. The Internet empowers consumers to develop and purchase their own itineraries, thus passing over travel agencies. This is also reinforced by the recent commission capping by airlines around the world. Future intermediation of the tourism distribution channel will obviously be quite different from the current situation.

Probably different market segments will use dissimilar distribution channels for purchasing their tourism products. In Poland, older generations and people who travel infrequently continue purchasing tourism products from traditional travel agencies. They make up 78% of the off-line sales performance (Tourism and New Technologies..., 2013). However, business and frequent travellers (especially the Gen Y representatives) prefer to use on-line providers to arrange their itineraries and make reservations. The pace of change depends on the security of Internet transactions, the reliability and quality of information available and the convenience of the entire process.

Disintermediation or infomediation?

In the context of the Web, disintermediation has come to signify the disappearance of a wide variety of intermediaries and the creation of an enhanced sales network in which customers deal directly with service providers. The first studies on e-commerce provided contradictory predictions about the impact it would have on intermediaries. While the Internet could render many distribution intermediaries obsolete and the opportunities presented by this channel seem readily apparent (e.g. bypassing others in the value chain, lowering transaction costs), there is still much debate and speculation on exactly how the use of the Internet will affect established industries. To date most research into the implications of the Internet has focussed on the Web from a general marketing perspective, or from a marketing communication perspective. One of the most interesting objects of study concerns the Internet influence on the intermediaries position in the value chain (Wynne et al., 2001; Laesser & Jäger, 2001; Tourism and New Technologies..., 2013). Some researchers suggested that the Internet would kill intermediaries off, while others concluded that their role would become more important than ever (Tourism and New Technologies..., 2013; Meuter et al., 2005). Evans and Wurster (1997) pointed out that the possibility of dissociating the physical flow of products and related information offers new opportunities for reshuffling and reconfiguring the relationships among all the participants in the value chain—suppliers, distributors, retailers, and customers.

However Laesser and Jäger (2001) and Wynne et al. (2001) contend that predictions of the imminent demise of intermediaries are premature, reflecting both a failure to analyse the variety and importance of intermediary functions and the lack of an overall strategic view assessing the costs of services intermediaries provide in the context of their perceived value to clients and customers. Similarly Braun (2002), Brynjolfsson and Smith (2000) and Buhalis and Licata (2002) anticipate the unavoidable process of re-intermediation.

The basis for such assumptions results from the strategic importance of the information value chain. Information has always been an important component of the tourism value chain. Nowadays the tremendous increase in information resources and connectivity available to businesses can provide major strategic advantages, which in turn contribute to the emergence of the novel intermediary functions: firms can better organize and control logistics while enhancing customer service, they can create special long-term relationships with customers and establish more efficient retention programs, use the Net to obtain better control over their business networks and more contact with end users.

In comparison to traditional media, the Internet combines and integrates all functional properties such as information, representation, collaboration, communication, interactivity, and transactions (Gretzel et al., 2000). It offers a powerful combination of two-way interactivity, seamless transactions, addressability, on-demand availability, and customisation (Tourism and New Technologies..., 2013). Being generally very positive, the phenomena are very difficult to control. They lead to information overload or „data smog” (Shenk, 1997). Information overload occurs when the amount of input to a system exceeds its processing capacity. Decision makers have fairly limited cognitive processing capacity. Consequently, when information overload occurs, it is likely that a reduction in decision quality will occur (Stockdale, 2007). The problem concerns every aspect of decision making whenever it is a company strategic decision or family travel planning. Thus Kachniewska (2014b) gives one more argument for mediation in the contemporary marketplace: professional personalisation of information. The explosive growth in the size and use of the World Wide Web may lead in orientation difficulties, as users often lose sight of the goal of their inquiry, look for stimulating rather than informative material, or even use the navigational features unwisely. To alleviate such navigational difficulties, researchers try to identify the peculiarities of each user group and design systems that could deliver a personalized content.

When carried out either directly or via a third-party intermediary, four key functions make exchanges easier, cut the costs of carrying out the sales transaction, and improve responsiveness to customer needs (Jallat and Capek, 2001). These four functions include:

- aggregation (which is an alternative to the situation in which each buyer must find a direct source of goods and each producer must sell products directly to individual customers).
- trust (protection against opportunistic or manipulative actions)
- facilitation (easy way to look and book, associated services)
- matching (database management, sending selective information, comparing products, limiting customers’ research time and expense).

Corigliano and Baggio (2004) claim that few firms in the travel industry fully appreciate the value that interactivity offers and attitudes to the use of websites remain locked in the advertising domain. This view is supported by a study of websites: travel companies could lift sales by at least 33 per cent by improving customer experiences of website use (Hsu et al., 2004). However, what is true for buyers also applies to sellers: infomediaries can supply information on characteristics to help vendors find markets as well. The personalisation of internet/mobile services needs a new way of thinking about the users role in a digital ecosystem. Consequently the new role of tourism intermediaries can be described as infomediation. New mediaries take over the coordination of information and transaction flows between individual network partners that are concomitant with e-commerce (Hagel and Rayport, 1997; Kachniewska, 2014a). The collection and analysis of data can be used to create a knowledge base to support the management of customer relationship building. An effective, customer-driven knowledge base can be used

to tailor products and services, to follow trends in customer behaviour and to respond more quickly to changing customer demands (Gianforte, 2003). The ability to customise also supports micro-segmentation of the target market where personalized content is offered to different customer segments. Traditional intermediaries are to reengineer their processes in order to up-date their offering, improve customer satisfaction and remain competitive (Kärcher, 1997). Tourism destinations need to develop regional systems to enhance their representation, boost their image and attract direct bookings.

Despite the supply-side network effects in tourism and the convergence with other industries there is also a demand-side driver for infomediation emergence in the tourism market, namely a trend towards the establishment of customer networks (social networks). Both, the supply-side and the demand-side network effects bring the power of absolutely new marketing solutions, provided that infomediation succeed to match and coordinate the two market sides.

Implications for tourism infomediation

Although physical activities surrounding the tourist experience will not fundamentally change, it is likely that all “virtual activities” (the provision of information, the arranging of reservations and searching for destinations) will move to the Internet, as all the activities can be done far more efficiently on the Internet than through printed brochures and current intermediaries. Free access to information on the Web could push customers to make their own choices and bypass traditional intermediaries (Tourism and New Technologies..., 2013). But such arbitration is not merely price-based. Other factors must also be accounted for and weighted accordingly, such as time required to find the information, comparative shopping, perceived transaction risk etc. (Jallat and Capek, 2001; Liljander et al., 2006).

Bloch and Segev (1996) claimed that free information will reduce the power of the current intermediaries and could remove the advantages of proprietary networks such as CRS. Still numerous researchers agree that the Internet does not remove the need for intermediaries (Wynne et al., 2001; Buhalis and Licata, 2002; Tourism and New Technologies..., 2013). Despite the relatively high digital literacy of young tourists, the attempts to book on-line are often frustrating due to the difficulties resulting from different formats of presenting information and inability to make comparisons. Both in real world and in the Internet, consumers do not want to deal with the problems of contacting multiple suppliers. They will look for a middleman, who will offer them advice and save them time and money (Bloch and Segev, 1996).

Web sites have a role to play in distribution, however, should not be the only web distribution channel. Albert et al. (2004) present a framework for the development, design and management of effective websites that calls for customer-centric designs. Such designs require the gathering of data on visitor characteristics and behaviour, understanding where they come from, segmentation, tracking of segment behaviour and development of site content and interactivity to meet the needs of each segment. In essence, the site must fulfil customers' needs for specific information or transaction capabilities (Kachniewska, 2014b). A total online distribution strategy therefore is needed with a direct-to-consumer distribution model at the centre of the multi-channel strategy. Moreover, individual destination service providers are not in a position to benefit from the ability the Internet provides to build up customer profiles, since most customers are first-time visitors. However, “new intermediaries” can potentially build up very detailed customer profiles (Tourism and New Technologies..., 2013). In order to take advantage of the opportunities presented by the virtual channel and the trends in tourism and marketing, infomediation will aggregate

information in a single format at a single virtual destination. They can routinise transactions by providing a single integrated reservation system that allows customers to book all parts of their holiday in a single transaction and facilitate customisation by offering customers the ability to create their own itinerary.

Infomediaries permit comparisons by offering information in a uniform layout, providing access to comments made by previous tourists, and operating a grading system. They should also offer comprehensive services that allow customers to make all their travel arrangements at one site and maintain a database that will allow to build up an accurate profile of each tourist and use this to customise the services to each customer. Here we get to the idea of big data processing. Big data can be the foundation for greater industry-wide innovation, however it demands big ideas and the courage to implement them (Tourism and New Technologies..., 2013; Kachniewska, 2014c). Big data can provide insights that help deliver a more intelligent travel experience than has ever been possible before. This offers travel companies the opportunity to enhance current industry processes, push innovation and build better relationships with their customers. All the challenges are much beyond the abilities of distracted SMEs – it needs perfect infomediation, modern data processing and perfect technological solutions. A modern infomediaries would have the added advantage of being able to build up a customer database, since customers would make all their travel arrangements through the same site. “Hence infomediaries would be able to suggest appropriate holidays to the customers and ensure that the travel arrangements suited their particular needs. This relationship marketing would build customer loyalty and switching costs that no other industry player could achieve.” (Wynne et al., 2001).

Conclusions

A fundamental postulate about the disappearance of intermediaries is based on users being intelligent and expert enough to use the Net and having time to do so. Then tourism intermediaries' role in terms of advising and providing aggregation, could be replaced by virtual contacts. Such vision of a simple, open, and transparent market, however, often turns out to be questionable when tested in real life.

The generic idea of disintermediation to which e-commerce specialists often refer does not necessarily mean destruction of travel intermediaries. Rather, it means discovering “new intermediation” or just infomediation, as the latter refers to the digitalization of the tourism market. Infomediaries will also have the unique possibility to deal with big data, which has a vital role to play in delivering a more efficient and tailored travel experience with benefits to both travel companies and travellers alike.

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