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SPANISH TOURIST SUPPLY CHAIN: AN ANALYSIS OF THE INTERMEDIATION

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Tourism in Spain is a complex industry in which there exits a wide number of agents which work together in the production, distribution and marketing of tourist products. In this sense, the tourist distribution channel is characterized by the number of intermediaries (length) which take part in the commercialisation of different tourist products or services (amplitude). The existence of different leading factors throughout the chain and their possible combinations require the execution of collaborative activities to be accomplished in a coordinated way. This set of tasks referred as the concept of supply chain management (GCS).

Within the GCS, there may be a greater or lesser complexity depending on the number of intermediaries working on it. That is why the entire process could be regarded as carried out in two different ways: direct sales (producer-consumer) or mediated (producer-supplier-consumer).

Research on GCS is not extensive in bibliography. Literature on Tourism rather focuses on specific aspects of its functioning, or in the relationship between its members: Tour operators (Caccomo y Solonandrasana, 2001); between these and other producers (Han et al., 2004; Bastakis et al., 2004); between producers and travel agencies (Alamdari, 2002); or among wholesale and retail agencies (Tsaur et al, 2006). However, several studies have shown that the tourist industry should be analyzed from an integrated view (Yilmaz y Bititci, 2006; Alford, 2005; Page, 2003; Alcazar, 2002).

On the other hand, there are large studies and statistics about tourism in Spain, however, they fail when dealing with the structure of the supply chain of this industry, being the results is in some cases very opaque. This fact, as a consequence, puts at risk the sustainability of the market.

Therefore, the main goalof this paper is to clarify it with the development of an input-output table, where the tourist operators in the market and the different products or services they sell all together. In short, the table provides explicitness to the relationships between the different agents in the tourist supply chain in Spain. It also establishes to a certain extent the types of companies which play a dominant role within this network. Several studies have used the input-output methodology in the tourism sector (Fletcher, 1989), most of them, in order to calculate impact multipliers that are based on perspectives of regional type (Baaijens et al, 1998. Archer and Fletcher, 1996), in particular business relationships within the supply chain (Chang, 2000), analyzing both aspects (Robles and Díaz, 2013), or focusing on the results of economic politics which are supported on the sectorial specialization (Gasparino et al., 2008).

After analysing the data it is interpreted that the «disintermediation» is imposed on all channels, including the production companies. That is to say, it stands out the direct sales made by the producer of goods or services whose main aim is to achieve the greatest possible value. When the tourist commercialisation through intermediaries is analysed, it is highlighted the trend towards the direct sale by producers. This is reflected in the study since it is estimated that the direct channel and the long channel (with one intermediation) equal the 90% of the total transactions.

To complete the study, the Leontief inverse matrix is calculated, and the rates of chain and Chenery and Watababe. With the Leontief matrix it is demonstrated that the companies that take more profit from the tourism demand (direct and indirect) are hotels and airlines. It also shows that retailers agencies are the operators more capable of creating market, beating online agencies and CRS-GDS. To calculate the chain index, the most notable result is that the intermediaries are the most significant actors in the supply chain because of their absolute amount of sales; not the producers, as it could be thought beforehand. Among the different intermediaries and, according to the results obtained, the most important agents are the tour operators, point that is confirmed by the index and Watababe Chenery.

Despite the current trend towards direct sale, the analysis showed that the existence of intermediary agents is of paramount importance for the whole of the Spanish tourist sector, due to the presence of large transactions of buying and selling which make the value of production reach almost duplication.

In the use the intermediation channel, it prevails the existence of a single intermediary in the consumer sales transactions: this agent even trebles the income of producers, for example, in the specific case of the hotels.

In general, it becomes latent a growing need to find the balance between direct and intermediate sales, by the profits generated when working together and the damages that cause operating in isolation or individually. Therefore, in the sector prevails a collaborative strategy that offers benefits to all actors working together, both producers and intermediaries. On the contrary, the simplification of the sales channel in tourism can generate a reduction of income and can even question the sustainability of small producers and/or intermediaries without great economical resources.

In the same way, even though producers are the most important actors in the supply chain for its volume of business, when the process of buying and selling is considered together, the intermediaries responsible of holding the system. Accordingly, it is proved that the tour operator is the strongest component of the chain, although in the buyer side, the retailers take precedence.

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