THE SOCIAL MEDIA IMPACT ON THE STRUCTURE OF TOURISM DISTRIBUTION SYSTEM: ANALYSIS AND CLASSIFICATION OF NEW TOURIST SERVICES PROVIDERS IN THE ENVIRONMENT «ONLINE»

José Ramón Sarmiento Guede
International University of La Rioja
joseramon.sarmiento@unir.net

The ICT (Information and Communications Technology) and the relations (Relationship Marketing) are the main structure under the Spanish tourist industry. The information is the «core» of tourism, therefore technology has become crucial for the industry to work and operate. The ICT's have improved the trading relations, they have permitted to personalize the services and they have also granted more power to the providers. The new distribution structure which is being built thanks to the ICT could be endangering the traditional intermediation, as we are heading towards a new paradigm: the online touristic distribution. In order to carry out this research about online touristic distribution we have set two main points:

1. Identify the new classification from a qualitative perspective.
2. Analyze quantitatively the utilization of ICT tools by the users.

To achieve those two goals, we will start by presenting the theoretical framework which determines the research; the three pillars that hold the paper are, indeed, the ICT, the touristic service distribution system and the Social Media. Subsequently we will explain the methodology from both a qualitative and a quantitative view. On the next paragraph we will see the results and determine the classification. Finally, having the results into account, we will draw conclusions about the impact of Social Media on tourism distribution systems classification.

The ICT are usually defined as «the whole set of electronic devices that help the operational and strategic management of the organizations enabling them to manage information, functions, processes as well as to communicate interactively with every concerned individual in order to achieve its goals» (Buhalis, 2003, en Copper *et al.,* 2005:831). The ICT facilitate touristic companies the development of their processes and the adaptation of their management practices so they can use the new digital mechanisms and tools, thereby increasing their efficiency and cooperation as well as their interaction with customers and the using of their tools.

In the distribution system of touristic services, one of the main aspects we should underline is the strong dependency between providers and intermediaries; as the intermediaries participate in the whole value chain they hold a dominant position atop the providers. Since the beginning of the 1980's we could differentiate two distinct distribution channels:

1. «Direct Channels» which represent the fastest and cheapest way towards the touristic service as there are no intermediaries.
2. «Indirect Channels» those where the wholesaler intermediates between the provider and the customer in many ways, such as promotion and service negotiation, raising the price of the service.

On the tourism sector, during the age preceding the development of the Internet, the more feasible option was the indirect channel, as the intermediaries (CRS, GDS, TTAA and TTOO) made the production and distribution processes very easy. During the 1990's though, the Internet made it possible for the customers to use the direct channels besides the indirect ones (it was even possible to combine both channels). The decision on which channel to use depends, basically, on the advantages and disadvantages generated by the direct channel of distribution through the Internet and how they affect to touristic services, travel agencies and customers.

The inrush of Social Media in the travel industry has induced almost 40'2% of the users to declare that in the future they will organize their trips through a «marketspace» channel. In this context, Social Media have promoted the creation and development of new intermediaries inside the online environment; those channels appear to be more attractive than traditional ones as the user co-creates value alongside the company. Nowadays, the users that pretend to organize their trips online have a huge variety of websites and apps 2.0 (Social Media). Among the new intermediaries, we identify booking systems, online travel agencies, browsers, metabrowsers, destination management systems, social networks and price comparison apps.

The methodology with which this research has been performed is structured in two sections: the first (1), qualitative paragraph, in which there were two group meetings (focus group) in order to establish the more suitable classification according to the point of view of the experts of the tourism sector; the second (2), the quantitative paragraph, which consisted in survey young college students from Comunidad de Madrid so as to know the level of use they had of new tourist service websites. The reason to choose that spectrum inside the population was in order to meet the criteria of sample unit. Comunidad de Madrid was chosen because it is the region of Spain where Social Media are more widespread, and college students are the population sample with a higher affinity index to that kind of technology (218 on the age spectrum between 18 and 24 years old). To collect the data we used the personal survey (questionnaire). The main empirical contributions to the academic practice were as follows:

Responding to the first point of our research, we can say that the online tourist service distribution system (transport and hosting websites, browsers, opinion servers, destination management websites and apps as well as online travel agencies) has sharply changed

with the irruption of new intermediaries due to the appearance of Social Media. And considering the second point of our research, we can assert that 40'07% out of the surveyed users prefers this new intermediary platforms instead of the traditional indirect channels for their travel planning.

Again having into account our second main goal, to quantify the scope of this new tools, we can assert that the 52'3% of the respondents use those websites several times a year and 22% several times a month. This indicates that most of the users enter this websites exclusively when they pretend to travel, as 99'6% of the respondents said. The 74'4% of the users do not generate any kind of content in the websites from their smartphones. This fact shows that most of websites do not develop any mobile marketing activity.

The main reason of use for travel websites is price comparison with 59'8% out of the total; the second reason, with 53'1% is to find general tourist information; the third most important cause is seeking images with a ratio of 29'9%, the fourth most important reason with a 29'5% is to purchase and the fifth and last, with the 28'3% is to read comments and opinions. Looking at the outcome of the research we can assert that travel websites are changing because of the implementation of Social Media. Formerly, main reasons to visit and use travel websites were just to purchase and seek information, as we have just seen, nowadays there are way more than just two reasons for users to get into this kind of websites therefore we can say the behavior of the customers has changed radically.

Even though the most used travel websites are still the online travel agencies with a ratio close to the 41% it is important to highlight and analyze the substantial increase on browser servers and opinion websites. Comparing the data with previous researches, we can assert that, as the main use is price comparison, seems logic that the browsers are used by the 21'1% of users. Another main reason to use websites was to seek images and read comments, again it is coherent that 18'5% of the users visit travel opinion websites. Some surprising data on the lower part of the ratios as we found how little hotels, apartments, and country house websites are visited: just 1'1% tourist destination websites even less with just a 0'7%.

Another relevant contribution of the survey was to find out which was the most visited travel website. Here we have the two hegemonic transport websites: Ryanair and Renfe. Looking at the hosting websites, NH Hoteles was the most important. In the category of opinion websites, the most visited is Tripadvisor which is also the most visited website of the whole survey. Among the browsers the most used is Trivago. And finally, the main online travel agencies are Booking, Atrapalo, Rumbo and Edreams.