

IMPACT OF ICT IN TOURISM: THE COLOMBIAN CASE

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Information and Communication Technologies (ICT) have boosted global tourism, by adopting business models focused on Internet Marketing. For Colombia this trend is relevant because tourism is one of the sectors with the highest growth in recent years. The average annual increase in international arrivals in Colombia in the decade from 2004 to 2014 was 11.7% and the variation between 2015 and 2016 was 13.32%, well above the world average (4.1% growth during the decade 2004 to 2014), becoming the third line of the national economy that brings more foreign exchange to the country, after coal and oil. For the year 2018 the tourism sector is projected to generate foreign exchange for \$ 6 billion and 300,000 new jobs (MCIT, 2015a; MCIT, 2015b; MCIT, 2017).

The growth of tourism in Colombia can be explained in the first place by the considerable tourism potential of the country represented in its natural and cultural heritage and its privileged geographical location as an entrance to South America, which gives the access to the Caribbean Sea and the Pacific Ocean. Secondly, it is due to the sector's momentum from national, regional and local public policy because three sub-sectors (nature tourism, medical tourism and welfare tourism) have been included within the 20 sectors of the Productive Transformation Programme (TPP) which will boost the country's productive development in the coming years, through the creation of more competitive environments and more consolidated and productive companies, with the use of ICT being one of the most outstanding strategies. Finally, the growth of tourism is explained by the ending of the armed conflict and the transition to peace, which has fostered a climate of security favoring the arrival of foreign visitors (Díaz y López, 2016).

With regard to the ICT Policy, the Colombian Government has created the Ministry of ICT [MinTIC] in 2009 through Law 1341, to promote the massification of the Internet and its use by companies. It is estimated that by 2018 there will be 100% broadband internet coverage in all municipalities in the national territory. In this environment, the tourism sector has a comparative advantage more for its development and consolidation, taking into account that the Internet has been the technology that has impacted tourism companies

for more than two decades, changing the concept of business of those companies that face the challenge of meeting the needs of the new tourist profiles of the digital era. For Vilaseca et al. (2007) y Buhalis (2000), the innovation is the key to consolidating companies and destinations; to take advantage of new technologies and the Internet as a means to improve their competitiveness, increase their visibility, reduce costs and business cooperation.

In order to analyze how Colombian tourism companies use ICT, a descriptive study is made by going to primary and secondary sources, concluding, that the most do not use ICT properly, despite the favorable environment for the development of tourism and the massification of the Internet.

The documentary study shows that the vast majority of tourism service providers are MiPyme (Micro, Small and Medium-sized Enterprises), which have advantages over large companies in terms of flexibility to satisfy customers demands and are an efficient means for the distribution of wealth, reducing the inequality gap and facilitating the integral development of the territories. This aspect is relevant to the global challenges of sustainable development (López & Martínez, 2015). But returning to the theme of the MiPyme, these ones also have notorious disadvantages compared to large companies, because of their low innovation capacity and the difficulty to appropriate new technological tools that allow them to change their business structure towards Internet Marketing (Gálvez, 2014).

The new concept of business focused on Internet Marketing, involves deep changes in the traditional way as the entrepreneur relates to the tourist, integrating him within the process as an actor more. Here the tourist is a part of the value chain because he becomes a promoter of service and destination through recommendation, especially in social networks and blogs, arising what has been called Social Marketing based on experience (also called Experiential Marketing). Therefore, the strategy is to provide the tourist with online communication and have a permanent contact in the conversations of social networks and blogs. So the value chain becomes a cycle where the tourist is the final link as a consumer and participates in the first link as a promoter (Vilaseca, Torrent, Lladós y Garay, 2007; Gálvez, 2014).

As it is appreciated the tourist is fundamental and the new profile of the travelers, regular users of Internet highly appreciates the experience of the trip and the facility of sharing it in real time with his/her friends in the social networks (Casaló et al., 2012; Akoumianakis et al., 2011; Buhalis, 2000 y Lamsfus et al., 2010). On the other hand, it is estimated that the number of native internet tourists is increasing and, in addition, they influence older travelers, so that in a decade everyone will use technology (cell phones, tablets and laptops) to plan, buy and share the experiences of his/her trip, eliminating links and establishing a direct contact between the tourist service provider and the traveler. Here is an opportunity for service providers to understand the expectations of the traveler and travel agencies to change their business concept.

The study of primary sources allows to characterize the users of ICT with the following numbers: according to the survey done by Ipsos Napoleon and the ICT Ministry in 2013, 80% of people use the Internet, 90% of social network visitors are between 15 and 24 years old, the people who buy the most via the internet are from Strata 4 and 5 and are between 25 and 44 years old (MinTIC e Ipsos). In the last quarter of 2016, MinTIC (2017) reports

that the connection to broadband Internet showed an increase of 23.1%; the 3G and 4G mobile telephony, an increase of 35.6% and the cellular telephony penetration rate grew up 20.34% with respect to the same period of 2015.

The previous data contrast with the use made by Colombian companies of these technologies, according to the results of the study where a validated instrument was applied to a representative sample of 99 companies with a reliability of 90%. The overall results show that the most commonly used tools are: e-mail 90% of companies, but only checked by half of them every day; 75% have a presence in social networks, but no company has a social marketing strategy and only 20% review them daily; 70% have a website but only 25% update it every month; among other less used tools, only half of the travel agencies have specialized software like OTA (Online Travel Agencies). The study showed that for most companies ICT are not a part of the sales strategy but are a mechanism of communication. However, they recognize that ICT, especially the website, followed by mail and finally social networks are tools that could improve their competitiveness, but do not have the knowledge to implement Internet marketing strategy.

The population of companies to extract the stratified sample was chosen from the National Registry of Tourism (RNT, for its initials in Spanish), which was created from the stipulated in the General Tourism Law (Law 300 of 2006) so that companies providing tourism services are obligatorily registered to legalize their activity. At the moment of taking the sample, August and September 2013, the RNT had 13,727 tourism establishments throughout the country distributed as follows: 52.1% lodging and accommodation establishments, 29.2% travel agencies, 5.7% gastronomy establishments and similar establishments, 5.2% tourism guides, 1.7% land transport companies and 7.8% others (RNT, 2013 y López y Martínez, 2015).