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THE EFFECTS OF THE APPLICATION OF THE INTERNET AND INFORMATION AND COMMUNICATION TECHNOLOGIES IN THE FIELD OF TOURISM MEDIATION

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ABSTRACT

Over the years tourism mediation has experienced major changes, including the arrival of the Internet and the application of Information and Communication Technologies (ICTs).

The principal aim of this communication is to analyse the transformation of the travel agency subsector in the light of the changes that have occurred following the application of ICTs.

By virtue of the nature of the research, a qualitative methodology was used, consisting of in-depth interviews with managers working in physical, *online* and franchise travel agencies and tour operators present in Galicia.

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The conclusions reached corroborated that the means used by tourism consumers to access information has changed following the application of ICTs, leading to situations of tourism 'de-mediation' and 'remediation' and impacting considerably on the role played by travel agencies in the chain of value.
KEY WORDS: Tourism mediation, ICTs, the Internet, Travel agencies

1. INTRODUCTION

Today nobody would question the fact that the development of the Internet, Information and Communication Technologies (ICTs[5]) and the rapid succession of events in the digital world have brought a period of change whose scope naturally extends to the tourism sector. Not only because it has placed powerful technologies and networks within the reach of consumers, but also because they have provided new management models and concepts, particularly in the field of tourism mediation[6] (Campos, 2011).

In this sense, the Internet has also represented a series of challenges and opportunities for travel agencies, the result of the appearance of innovative tools that contribute to improving their market position, enabling them to attract a wider customer range and secure their loyalty. This situation has led the tourism sector to channel its efforts towards developing strategies that boost the market competitiveness of tourism companies, enabling them to work more efficiently within the chain of value and increasing their revenue and profitability.

We believe that travel agencies are the cornerstone of tourism mediation, as they provide the services necessary for travel and tourism. The origins of these companies, which date back to the mid-19th century, coincided with the consolidation of earlier travel patterns and the expansion of new means of transport such as the railways and steamships, providing travellers with easier and more convenient methods of travel (Ruiz, 2012).

However, since the onset of the economic crisis in 2008, Spain has witnessed the closure of more than 4,000 traditional travel agencies, affecting approximately a quarter of the sector. An analysis of the Spanish travel agency sector reveals that the number of agencies exceeded demand, and therefore the fall in turnover partially contributed to resolving this situation, to the detriment of the smaller agencies. Indeed, according to data from the Amadeus Centre (2011), the number of agencies connected to their reservation system feel from 9,127 in 2007 to just 6,075 by the end of 2012 (Amadeus, 2013).

From the third quarter of 2007 onwards, there sales of trips to Spanish destinations slumped, a trend that had a major impact on a large number of Spanish travel agencies and tour operators, as can be observed from the data published by the Spanish Ministry of Industry, Tourism and Trade through its Institute of Tourism Studies (2008, 2009, 2010 and 2011). However, the rise in travel in the international market, characterised by higher business margins and a slight rise in prices, offset this downward sales trend and allowed for a certain levelling off in terms of the inter-year profit increase during the third quarter of 2007.

The turbulent economic scenario that emerged in 2008 led to a fall in tourist demand, causing Spain's major tourism groups to implement major cost-cutting measures in order to maintain profit levels both in the retail and wholesale sector, as well as among tourism business and commercial groups.

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[5] ICTs (Information and Communication Technologies): the elements and techniques used in the processing and transmission of information, essentially computers, the Internet and telecommunications.
[6] Tourism mediation: authors such as Del Alcázar (2002) have defined the agents that intervene in the distribution system of Spain's tourism sector as travel agencies (retail, wholesale and retail-wholesale); central reservations systems (GDS and reservation systems) and other intermediaries (*brokers*). For the purpose of this research and in relation to this classification, tourism mediation shall include only traditional travel agencies and online agencies, although we are aware that the concept of mediation is far broader.

In this sense, the application of ICTs over the last few decades has affected the competitive environment, with a particular impact on the tourism industry in general and travel agencies in particular (Castillo and López, 2010). The appearance of communication, sales and distribution channels such as the Internet, has provided organisations and tourism consumers with powerful networks and technologies, which in turn have led to the creation of new management models and concepts within tourism, creating a new competitive framework in the travel agency market (Mayr and Zins (2009); Suraya 2005).

The economic, social and technological changes that have occurred in the current environment have led the tourism mediation sector to design solutions aimed at securing their survival and continuation in the market. These solutions include internationalisation and alliances within the tourism industry; a new price philosophy; and the appearance of further subsectors within the travel subsector or specialisation (Hosteltur, 2012a).

Prior to embarking on this research, a review was carried out of the literature related to the principals and empirical contributions within the theoretical framework. In addition to the main objective, namely to analyse the transformation suffered by the travel agency subsector in Spain as a result of the changes brought about by the application of the Internet and ICTs, two further secondary objectives were established: to analyse the use and influence of the Internet and ICTs on tourism mediation companies in Spain and to determine the degree to which the Internet and ICTs have influenced the paradigm shift of tourism mediation companies in Spain and their outlook for the future.

2. THE CURRENT SITUATION OF TOURISM MEDIATION IN SPAIN

In order to determine the current situation of tourism mediation in Spain, we will first analyse the country's retail and wholesale travel agencies and before going on to consider the situation of online travel agencies.

According to the HOSTELTUR (2013) ranking, in 2012 sales of the top six retail travel agency networks stood at 5,395 million euros, a fall of 9% in comparison with the previous year's figures, as shown in table 1:

Table 1.- Hosteltur ranking of the major retail travel agency networks

AGENCY	SALES 2012	SALES 2011	2011/2012
1 Viajes el Corte Inglés	**2,260**	**2,426**	**-7%**
2 Halcón Viajes Ecuador	**1,134**	**1,330**	**-15%**
3 Vibo	**859**	**960**	**-10%**
4 Carlson Wagonlit Travel	**491**	**500**	**-2%**
5 Barceló Viajes	**466**	**475**	**-2%**
6 Viajes Eroski	**185**	**210**	**-12%**
TOTAL	**5,395**	**5,901**	**-9%**

Source: adapted from Hosteltur (2013)

The continuing economic crisis and its impact on the fall in consumer spending in Spain had negative effects for the entire sector in 2012, including the major networks that in 2011 had avoided this situation by acquiring the market share of the thousands of SMEs that were forced to close.

[7] *Halcón Viajes Ecuador* is the result of the union between *Halcón Viajes (*the retail division of the *Globalia* group and the consolidated leader of the Spanish tourism sector in 2011 in terms of the number of points of sale and the creation of exclusive products) and *Viajes Ecuador,* which was acquired by the group in 2003 as one of the fastest growing agencies due to its extensive presence throughout Spain (*Globalia*, 2012).

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The table shows that Viajes El Corte Inglés retained its leading position with sales that exceeded those of its immediate rival, Halcón Viajes Ecuador, by more than €1,000. However, it should be noted that Viajes El Corte Inglés ended 2012 with sales of €2,260 m, 7% less than in 2011. Halcón Viajes Ecuador[7] ranks second, ending the year with a turnover of €1,134 m, 15% less than in 2011. The company had increased its market share in 2011 thanks to the rise in the number of franchises (Nexotur, 2012a).

In 2011 Viajes Iberia (currently known as Vibo) ranked third, maintaining the position obtained in 2010 following the closure of Viajes Marsans (Nexotur, 2012a). The retail network of the former Orizonia group, which, like its other divisions had been the object of a radical transformation, changing its name to Vibo, showed the best evolution. However, in 2012 total turnover for its 950 branches stood at €859 m, 105 down on the previous year. The positive results of previous years proved insufficient and in February 2013 all its branches closed after the company filed for bankruptcy.

Carlson Wagonlit Travel occupies fourth position with sales of €500 m in 2011, a 2.9% rise over the figure registered in 2010 (Nexotur, 2012a), although in 2012 its sales dipped by 2%. Barceló Viajes[8] ranks fifth, with an increase of 0.9% over the 2010 figure, although in 2012 sales fell by 2%. Viajes Eroski ranks sixth with €185 m, 12% less than in the previous year, experiencing the second sharpest drop after Globalia.

In the tour operator sector, total turnover for the top nine wholesale travel agencies operating on the Spanish market stood at 2,404 million euros in 2012, a drop of 6.5% over the previous year's figure. This is attributable to poor consumer spending and the decline of Orizonia, which would lead to its eventual closure in 2013.

Table 2.- Nexotur ranking of wholesale travel agencies

AGENCY	SALES 2012	SALES 2011	2011/2012
1 Grupo Orizonia	**559.0**	**1,093.0**	**-48.9%**
2 Travelplan	**545.0**	**648.0**	**-15.9%**
3 Pullmantur	**517.0**	**466.0**	**10.9%**
4 Mundosenior	**321.2**	**318.8**	**0.8%**
5 Soltour	**161.8**	**193.5**	**-16.4%**
6 Panavisión	**84.2**	**115.3**	**-26.9%**
7 Catai Tours	**75.0**	**83.0**	**-9.6**
8 Mapa Tours	**72.9**	**63.4**	**15.0%**
9 Politours	**68.1**	**72.0**	**-5.4%**
TOTAL	**2,404.2**	**3,052.9**	**6.5%**

Source: adapted from (2013)

In 2012, turnover for wholesale travel agencies operating in the Spanish market at the time the data were collected experienced an unprecedented slump. In contrast to the stagnation in 2011 and the 7.5% growth registered in 2010, production levels for this type of travel agency fell by a dramatic 21.1% in 2012. According to the data collected by NEXOTUR (2013), during this 12 month period Spain's nine largest tour operators registered a total turnover of 2,404.2 million euros, 648.7 million less than in 2011, when the figure exceeded 3,050 million.

[8] *Barceló Viajes* is the retail division of *Grupo Barceló*. In 2011 it e its position as 'the travellers' brand' amongst customers. During the course of the year it further strengthened its leading position by implementing strategies, initiatives and tools that situated it amongst the sector leaders. In the midst of a negative macroeconomic scenario, turnover in 2011 experience an overall growth of 8% compared with 2010, reaching €521 million. (Barceló, 2012).

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In 2012, top of the NEXOTUR ranking of wholesale travel agencies was the now extinct wholesale division of the Orizonia group (Iberojet, Solplan, VivaTours, Cóndor Kirunna and Orizonia Life), which during its final year of operations registered a turnover of 559 million euros, 48.9% less than in 2011, when the figure stood at almost 1,100 million. Of its various brands, Iberojet obtained the highest turnover with 353 million euros.

Turning to the situation of the online travel agencies, it must be said that Information and Communication Technologies have essentially resulted in the simplification and enhanced efficiency of routine procedures thanks to the use of integral tools, as well as the appearance of additional promotional and sales channels.

During the third quarter of 2012, turnover from ecommerce in Spain totalled €2,705 m, a rise over the previous year's figure. This upward trend would continue in the first quarter of 2013 to 2,822.6 million euros, 15.1% higher than the figure for the same period in 2012, registering a total of 43.5 million operations. In 2012 the leading sector was travel agencies and tour operators, which made up 16.2% of the total, with 438 million, an increase of 20.3% over the previous quarter, as reported by the Spanish Telecommunications Market Commission (CMT 2013). Nevertheless, the economic recession led to a fall in turnover of 13.8% for travel agencies and tour operators during the first quarter of 2013. Online hotel reservations made up 1.7% and car hire 1.5%, indicating that most of the Internet reservations for these products were made via online travel agencies.

The principal reasons for this growth include changes in tourism consumer patterns: no longer mere passive subjects, these consumers have now become. In addition, tourism promotion has also undergone major modifications, moving from mass communication to a far more personalised one-to-one relationship.

In the light of this scenario, virtual travel agencies operating in Spain have attempted to define their own business formula and market. Although their growth rate has slowed down in recent years, their sales percentages continue to rise, exceeding those of the large traditional agencies.

Table 3. - Hosteltur ranking of online travel agencies

AGENCY	SALES 2012	SALES 2011	2011/2012
1 eDreams	**1,230**	**1,125**	**10%**
2 Rumbo	**450**	**495**	**-9%**
3 Logitravel	**294**	**275**	**6%**
4 Atrápalo	**221**	**275**	**6%**
TOTAL	2,195	2,105	5%

Source: adapted from Hosteltur (2013)

The HOSTELTUR ranking for online travel agencies reveals that total sales for these agencies registered a rise of around 16% in 2011 in comparison with 2010. The figures refer to sales both in Spain and in international markets.

The data for 2012 confirm eDreams'[9] consolidated position as the clear leader in online agencies operating in Spain, with sales of more than €1,200 m, a figure that places it on a par with the major networks of high street travel agencies.

Second place in the ranking is held by Rumbo, which in recent years had experienced a rise in turnover, with total sales of €495 m in 2011, a 2% increase over the previous year's figure (Hosteltur, 2012b), although in 2012 its turnover fell by 9%.

[9] The figures given in this ranking for the *eDreams* and *Rumbo* are estimated made by Hosteltur (2013), as both agencies no longer provide a breakdown of sales and only publish those of the group they form part of (***Odigeo*** in the case of *eDreams* and ***Bravofly-Rumbo*** in the case of the latter).

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Logitravel and Atrápalo rank third and fourth respectively with sales in excess of €200 m. It must be stressed that Logitravel has experienced notable growth over the last three years. In 2011 sales rose by 40%, compared with the 30% rise registered by Atrápalo in the same year (Hosteltur, 2012b).

In the light of this scenario, one of the online travel agency strategies that seemed to show strong potential for success was the outlet formula or discount voucher; however, it failed to gain a hold on the market, as shown by the French agency Voyage Privé. In contrast, the entrance of major outlet portals such as Groupon, Lest Bonus, Planeo Groupalia, amongst others, does appear to have been successful.

After analysing the situation of the principal travel agencies operating on the Spanish market, it can be seen that the growing trend among the outbound market to book via the Internet is having an impact on traditional travel agencies, who are experiencing a decrease in the number of potential customers visiting their branches.

Competition from online agencies, which continued to enjoy steady growth even during the height of the crisis, as well as the principals' decision to opt for direct sales, especially in the case of carriers, also explain the difficulties traditional travel agencies are currently experiencing. In order to survive, small agencies tend to opt for strategies based not only on taking advantage of new technologies, but also on specialisation, focusing on factors that set them apart from the online offer, namely personalised service and advice.

3. THE EVOLUTION OF THE COMMUNICATION AND BUSINESS MODEL IN TOURISM MEDIATION

In the information society, Internet has become the most important tool in tourism sales and distribution as well as in all associated actions, namely defining product characteristics; the search for suppliers offering satisfactory products at the best prices; placing orders; and billing and payment (Andreu et al, 1996).

Authors such as De Borja and Gomis (1999) acknowledge the existence of a series of business opportunities within this new scenario that were duly studied and exploited by those large international companies that possessed the financial, human and technological resources necessary to position themselves and adapt to the change. The elements associated with the distribution of products and services received particular attention within this new context. These authors analysed the function of ecommerce via the Internet, concluding that it was made up of four parts:

- Informing customers of the goods or services available.
- Receiving customer orders.
- Receiving payment for the goods or services.
- Delivery of goods or provision of services.

This analysis enables us to determine those organisations with the greatest potential for carrying out their business in the electronic society and secure efficient business growth via an electronic network. Tourism occupies a prime position within this group. Most companies experience few difficulties in providing the first three elements, yet the fourth is only within the scope of those businesses that can provide their customers with the required product or service electronically.

Faced with this new scenario, it is necessary to consider how communication with customers has developed in order to tackle the shifting scenario of tourism mediation from an informed perspective.

Tourism consumers currently still do not have access to a tool that can offer the benefits of a GDS (Global Distribution System). However, Internet does provide them with access to systems that provide useful information such as timetables, prices or availability in order to reserve tourism products and services, previously the exclusive domain of travel agents (De Borja and Gomis, 2009).

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In this sense, travel agencies were soon identified as a sector that would be severely affected by the appearance of the Internet as a communication and sales channel for its services and products. Some went even further, predicting the disappearance of traditional travel agencies and the end of mediation. This has not occurred, although their strategies have experienced radical changes, rooted essentially in the use of ICTs.

In this context, Carr (2003, pp, 41-49) drew attention to the fact that the degree of insertion of ICTs in western countries is so far-reaching that they now form part of the infrastructure of any organisation. He referred to the application of this technology in terms of a key infrastructure without which it would be impossible to operate, yet which in itself fails to provide sustainable competitive advantage, as its use has become so widespread among the agents of the various economic activities that it has become basic.

Consequently, the competitive advantage Carr refers to must be sought in areas other than technology. Examples include the capacity to innovate by offering products and services that differentiate companies from their competitors, or offering the same products and services but applying more efficient production and operational processes (De Borja and Gomis, 2009). In terms of tourism mediation, these processes could be referred to as 'innomediation' (Sawhney et al, 2003).

In order to determine the scope and impact of the transformation experienced by the travel agency business model, we must analyse the innovations that have been introduced into mediation. One of the most interesting contributions in this area is that made by Andal-Ancion, Cartwright and Yip (2003, p. 87). These authors posit determining which business models could provide the greatest competitive advantage through the use of ICTs. Although their research does not specifically target the tourism sector, it does centre on distribution. They identified three types of transformations caused by ICTs: traditional demediation, remediation and relational mediation.

They also stated that the description of these models depends on 10 drivers whereby companies can forecast potential changes that will occur in their various areas of activity, based on the way that their products or services are commercialised. These factors are electronic deliverability; information intensity; customisability; aggregation effects; search costs; real time interface; contracting risk; network effects; standardisation benefits; and missing competences.

4. ECOMMERCE IN TOURISM MEDIATION

Numerous authors have provided a definition for the concept of ecommerce, three of which are given below:

- The Spanish Telecommunications Market Commission (CMT)[10] defines ecommerce as any purchase made via the Internet, regardless of the payment method employed. The key feature of ecommerce lies in the purchase order, which must be placed electronically, regardless of the payment method used".
- According to the Commissions of the European Communities (1999), ecommerce is any type of business, administrative transaction or exchange of information that uses any information or communication technologies.
- Gariboldi (1999) defines ecommerce as any commercial transaction (the production, advertising, distribution and sale of goods and services) made by persons, companies or electronic agents via digital media in a virtual market that has no geographical or temporal restrictions.

The analysis of these definitions indicates that ecommerce is the union of traditional commercial activity and new technologies, and that it is emerging as an essential business tool due to its capacity to cut delivery times and sales and promotion costs, benefiting both companies and consumers. Furthermore, it contributes to ongoing improvements to supply and enables local trade to go global, thereby boosting the efficiency of their transactions.

[10] CMT (Spanish Telecommunications Market Commission): Spain's independent regulatory body for the ecommerce and audiovisual services market. Its objective is to set and monitor the specific obligations to be met by telecommunications market operators and to promote competition in the audiovisual services market, pursuant to its regulations, and to resolve conflicts between operators and, where appropriate act as arbitrator in the event of any disputes between them (article 48.4 Law 32/2003).

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Following Martín-Moreno and Sáez (2004), it must be highlighted that these definitions include the sale of physical goods via electronic platforms as well as the trade of intangible goods, such as information or consultancy services.

In line with Garrido (2010), it could be stated that in general terms, the application of this technology initially failed to obtain the predicted degree of success, especially as far as SMEs were concerned. This author believes that this delay was attributable to the high costs involved in implementing the applications and services, as well as the aggregation effect and the technological complexities involved, aspects that would understandably slow down their development among small and medium companies and that would not be overcome until the appearance of the Internet and the World Wide Web, when it would become an additional distribution and sales channel for products and services.

In this sense, if we focus on traditional travel agencies, this channel should represent an additional medium for sales, boosting remediation processes. Traditional travel agencies such as Viajes El Corte Inglés, Halcón Viajes Ecuador or Viajes Eroski Bidaiak are using their websites as a means of adding to their offline sales. They have greater visibility among the online market and provide all their customers with easy and convenient access to their products. Nevertheless, and although ecommerce offers multiple advantages, not all traditional travel agencies have entered this market, thereby reducing their competitiveness.

As a result of the development of ecommerce, one of the changes experienced by traditional mediation has been the appearance of travel agencies operating exclusively online. In Spain they are known as 'online' or 'virtual' agencies as well as by the names used in English-speaking markets such as 'online travel agencies' (OTAS), 'pure players' or 'pure e-tailers'. Examples include Expedia, Edreams, Opodo, Travelocity or Lastminute.com, amongst others.

The rapid growth in the commercialisation, distribution and sale of products and services brought about by the Internet would appear to indicate that this medium offers nothing but advantages for companies. However, it also presents a series of disadvantages due to the continued reluctance of many consumers to use this method for commercial transactions, in particular when making purchases. We will therefore briefly consider the principal advantages and disadvantages associated with ecommerce.

Firstly, the principal benefits the Internet offers companies, as discussed by various authors and quoted in Flavián and Guerra (2003) are as follows: the potential for global access due to the elimination of the majority of logistic and geographical barriers (Moriarty and Moran, 1990); its future growth potential (Hamill, 1997); the possibility of maintaining interactive contact with consumers (Hoffman and Novack, 1996); reduced costs due to the lower number of intermediaries operating in the channel (Benjamin and Wigand, 1995; Frazier, 1999); real time communication (Frazier, 1999); the ease with which the selection of products and services can be varied or increased (Görsch, 2000); the possibility of benefiting from other parallel technologies (Geyskens et al. 2000); the low infrastructure requirements necessary to set up these kinds of initiatives (Enders y Jelassi, 2000); and the major economies of scale the organisation can take advantage of (Enders and Jelassi, 2000, and Frazier, 1999)

In turn, the disadvantages of the Internet for companies include the following: a sharp quantitative rise in competition over a period of several years (Frazier, 1999); the appearance of opportunistic behaviour by certain consumers (Lynch and Ariely, 2000; Daniel and Storey, 1997); the lack of security of the new medium and the consequent mistrust it generates among consumers (Rosen and Howard, 2000; Steinfield et al., 1999); corporate cannibalisation of the traditional offer via physical distribution channels by the online offer (Alba et al., 1997; Shapiro y Varian, 1999); the potential for conflict with traditional distributors following the appearance of this new offer (Coughlan et al., 2001); or the possible sharp fall in impulse buying (Machlis, 1998).

Likewise, and again following the work of Flavián and Guerra (2003), the Internet offers substantial advantages for consumers that can be summed up as follows: access to vast amounts of information (Frazier, 1999) in real time (Görsch, 2002), enabling them to compare the offer of various distributors (Alba et al. 1997; Bryjolfsson and Smith, 2000), and savings in terms of the costs associated with the search for information (Frazier, 1999).

As for the inconveniences online commercial activity poses for consumers, these include a lack of confidence in the buying and payment processes; the lack of security and fears when providing details over the Internet, a new channel for the distribution of personal data (Rosen and Howard, 2000; Steinfield et al., 1999); or the associated connection and operation costs (Machlis, 1998).

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5. RESEARCH OBJECTIVES AND METHODOLOGY

Internet and ICTs are believed to play a key role in the paradigm shift in tourism mediation, as they have simplified and reduced the costs of communication between customers and suppliers and lowered commercialisation costs during the economic crisis. In this sense, travel agencies are becoming increasingly aware of the importance of these tools and have therefore opted to apply them to both their distribution and commercialisation systems (Albert, 2006).

The main aim of our research is therefore to analyse the transformation of the travel agency subsector in Spain following the changes brought about by the application of the Internet and ICTs.

In addition to the main objective, a series of secondary aims has been drawn up, the analysis of which will further justify the central aim of this study:

- To analyse the use and impact of Internet and ICTs on tourism mediation companies in Spain.
- To determine the degree to which the Internet and ICTs have affected the paradigm shift in tourism mediation companies in Spain and their future outlook.

The methodology is based on the use of secondary sources as well as primary sources. A series of in-depth interviews were carried out, which proved to be a highly effective method of obtaining complex and confidential information as well as freely-expressed opinions regarding the issues posed (Taylor and Bogard, 1992; Delgado and Gutiérrez, 1994; Sarabia, 1999 and Grande and Abascal, 2000).

The decision to use qualitative research is based on the existence of a number of studies related to the field of travel agencies, in which the use of in-depth interviews proved crucial in analysing the object of study. It also provides an initial insight prior to a quantitative study or as a complement to other qualitative techniques. Similar work in this direction has been carried out by Parra et al, 2003; Rodríguez del Bosque et al, 2005; Moreno and Aguiar, 2006; Andreu et al, 2009; Galhanone et al, 2010; Guijarro, 2010; Berné, García and García, 2011, 2012).

Given the nature and objective of our research, namely to address a specific problem with a relatively limited sample of experts and professionals from the sector, the decision was made to hold semi-structured interviews using an initial outline containing the principal issues to be raised, although these may be adapted in accordance with the trajectory the questions follow and the respondent's answers (Trespalacios, Vázquez and Bello, 2005; Grande and Abascal, 2011).

The exploratory research was therefore based on in-depth interviews held in September 2013. The respondents are all individuals directly related to the world of traditional and online retail and wholesale travel agencies, selected by convenience in accordance with their potential to contribute to this article.

A total of six people were interviewed: two agents from a retail travel agency branch of retail-wholesale travel agency groups; two managers of retail travel agencies, one of which was a franchise; and finally, two agents from online travel agencies. In all cases the questions were raised in a funnel sequence (Esomar, 1973).

The questions were divided into two topic-based blocks: the first addressed a series of general issues surrounding travel agencies and their relation with the Internet and ICTs in order to obtain information regarding their use and influence on companies; and a second block intended to determine the impact of technology on the paradigm shift in tourism mediation and the outlook for these organisations in terms of technological change.

The respondents were contacted personally either by telephone or email. They were informed of the objective of our research and invited to participate. Those that agreed to take part were interviewed directly at a later date.

Table 4 shows the technical details of the interviews included in this study.

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Table 4- Technical characteristics of the in-depth interviews

UNIVERSE	Classified by online and traditional retail and wholesale travel agencies
SAMPLE UNIT	4 travel agents and 2 branch managers
SAMPLE COMPOSITION	Direct personal contact via email and face-to-face with 6 travel agencies
SAMPLING PROCEDURE	Convenience
METHODOLOGY	Ten questions divided into two blocks related to the objectives of this study

Source: authors' own

The following table shows a series of aspects related to the participants that took part in the qualitative study, namely the company they work for; the post they currently hold or held at the time of the interview; and the type of agency they represent.

Table 5. - Participants in the qualitative research

Respondent	Post	Company	Type
R.1	Manager	*Viaxes Narón*	Retail agency
R.2	Travel agent	*Destinia*	Online agency
R.3	Travel agent	*Up Travel*	Online agency
R.4	Manager	*NUBA, A Coruña*	Retail agency / franchise
R.5	Travel agent	*Halcón Viajes Ecuador*	Retail/Wholesale agency
R.6	Travel agent	*Viajes el Corte Inglés*	Retail/Wholesale agency

Source: authors' own

6. RESULTS ANALYSIS

This section includes a discussion of the opinions provided by the professionals during the interviews based on the objectives of our research. Consequently, regarding the objective **'To analyse the use and impact of Internet and ICTs on tourism mediation companies in Spain',** the following results were obtained:

Table 6. - Results of the in-depth interviews

Respondent	The use and impact of Internet and ICTs on tourism mediation companies in Spain
R.1	"They are **used** to book flights, hotels or package tours and even to make the final payment, which may be made via the PST or even a virtual PST; in other words, the Internet and ICTs now form the basis of mediation". "However, in terms of their **impact** it should be said that they have not had a direct

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	influence on sales, as the use of technologies has long been a traditional practice in travel agencies. Nevertheless, it is true that as the number of customers that can access the services rises, the potential for higher sales also increases".
R.2	"In the case of an online agency such as *Destinia.com*, technology – the Internet - forms the basis of our business and is therefore **used** in all company processes and procedures". "As for the **impact**, ICTs have brought information closer to the customers, enabling them to create their own personalised trips; likewise, the sector's adaptation to new technologies means the customers from anywhere in the world can obtain information about any company".
R.3	"As we are a *pure player*, our business model is based exclusively online and therefore our degree of usage is maximum". As for the **impact**, it must be said that in general the Internet and ICTs generate highly positive benefits, as they make our work faster and more efficient. As an online agency our degree of technological development is greater, giving us a competitive advantage over offline agencies, which can contribute to higher sales".
R.4	"We try to **use** the Internet and ICTs for everything, from email to videoconferences, websites and the social networks. Before reaching customers was more expensive, so technology has also enabled us to cut costs". "As for the **impact,** from my experience I would say that sales in our agencies have risen as we can now reach more customers and tailor the products to suit their needs".
R.5	"They are **used** above all in the central offices, but in our branch their use is more limited". "Here in the agency, the **impact** of the Internet and ICTs is mainly noticeable in the speed with which we can search for information. Technologies have had a particular impact on flight sales and communication with our customers is now more direct. Sales have also increased in comparison with other periods. Yet despite this, we continue to sell more in the actual agency".
R.6	"In our case we make considerable **use** of the Internet and ICTs". "As for the **impact**, ICTs provide fast, direct and more effective communication with our customers. ICTs have brought significant changes to the tourism mediation sector. New communication and information channels have emerged such as the Internet, social networks, blogs, etc., which are used by the agencies as well as the consumers/customers. Online sales have increased, which has led to an overall rise in the brand's sales. It is also true that it is now easier to launch last-minute offers that reach more customers and in better conditions".

Source: authors' own

The replies indicate that all the respondents use the Internet and ICTs to a greater or lesser degree, although not all do so in the same manner or for the same reasons.

In the case of the retail agency *Viaxes Narón*, it is clear that the Internet and ICTs are used at all stages of the reservation process, from obtaining information for customers during the initial stages of the sale, to the closure of the transaction and payment.

For *NUBA*, a travel agency specialised in long-haul destinations targeting a market segment with a high purchasing power, technology is an added value they offer customers, as it enables them to personalise the information and the trip. Furthermore, it provides a direct and constant flow of communication with customers via marketing emails and their monthly newsletters.

Viajes El Corte Inglés, the leading retail travel agency in Spain and a clear business model, concurs with the opinions of the other retail agency, yet also considers that the use of technologies enables it to offer more updated

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offers and launch specific deals featuring specialised products and targeting specific market segments thanks to the tools they provide.

The manager at *Halcón Viajes Ecuador* points to the fact that as a branch of the Globalia group, its capacity for action on the Internet and ICTs is limited. Instead, usage is focused on securing more efficient reservations in real time and obtaining information from the various principals they work with.

Finally, the two online agencies, Destinia.com and *Up Travel,* share the same opinion. Their agencies are based on a business model in which technology lies at the heart of the company, and is therefore present at each stage of the reservation process, as well as in their dealings with customers and suppliers.

As can be seen, all the respondents highlight the fact that the Internet and ICTs have made their work faster and more efficient and generate greater customer satisfaction, as they result in products that are more closely adapted to their specific needs and requirements. With the more complex traditional GDS, these objectives were harder to achieve.

The responses also indicate that the majority of the respondents have a positive opinion of the role and impact of technologies in mediation. They are seen as the basis of the current business model and therefore agencies are obliged to adapt and incorporate them. The main argument for this is the ease of accessibility and information management that the Internet and ICTs offer both the travel agencies and their customers.

However, it is equally true that significant differences can be observed in this sense depending on the type of agency. In the case of online agencies, the implementation of technologies has been parallel to the development of the business itself, as their model is rooted in technology rather than in offline channels. In contrast, traditional travel agencies consider that the use of these technologies has not resulted in a direct rise in sales, although they do associate them with the possibility of reaching a greater number of customers, which indirectly may lead to increased sales. Likewise, they associate technological development with the possibility of tailoring products more closely to customers' needs, both in terms of time and their characteristics.

However, the specific analysis of the large travel agency networks, namely V*iajes el Corte Inglés* and *Halcón Viajes,* reveals that the use of technologies has been more widely developed and therefore the objectives are easier to achieve, as they have an additional, electronic sales channel. In contrast, if we turn our attention to the smaller or specialised agencies, it can be seen that technological development plays only a small role, due to a lack of means.

Regarding the second objective of our research, '**To determine the degree to which the Internet and ICTs have affected the paradigm shift in tourism mediation companies in Spain and their future outlook',** it must be highlighted that as mentioned earlier, technological advances do not constitute a competitive advantage, but are instead a reality that all companies, including those in the tourism mediation subsector, must implement in order to remain in the market.

Table 7. - Results of the in-depth interviews

Respondent	To determine the degree to which the Internet and ICTs have affected the paradigm shift in tourism mediation companies in Spain and their future outlook'
R.1	"The **arrival** of the Internet has led to a remediation model, at least in the case of complex services such as package tours". "The **future outlook** is uncertain, except in the case of long-haul travel mediation".
R.2	"In my experience, the application and **impact** of the Internet and ICTs has led to demediation in terms of direct customers and remediation in terms of high street businesses. The main factor behind the changes in mediation is the need generated in people, which has contributed to the general opinion that products should be customised according to their preferences and tastes".

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	"I believe that the **future outlook** involves further advances in this sense, with the incorporation of other ways of selling products and other mobile devices".
R.3	"The Internet and ICTs have **led to** a situation of hypermediation; demediation because there are now services that customers can acquire on their own; and also remediation, especially in products such as package tours. However, it is also true that problems often occur such as cases of Internet fraud, which generate feelings of mistrust amongst customers". "In the **future**, mobile devices will play a key role in the commercialisation of tourism products and destinations".
R.4	"The **impact** of the Internet and ICTs in the paradigm shift has led to remediation. It has also brought information closer to the final consumer and in general has led to a reduction in product prices". "As for the **future outlook**, I believe things will get tougher for traditional travel agencies and I am convinced that they will have to become increasingly specialised".
R.5	"In terms of the impact, I'd say there has been a process of remediation. Travel agencies now sell low cost flights operated by Volotea which is already included on Amadeus". "In the **future**, the large chains will take over the smaller agencies. And only the most professional (specialised) ones will remain".
R.6	"In my opinion the **impact** of the Internet and ICTs has led to the demediation and remediation of the tourism sector. Customers are increasingly contacting online search engines rather than traditional agencies. However, when they are looking for a personalised trip, they go to the traditional agencies". "The **future outlook** will include a redefinition of travel agency activity: traditional agencies will disappear and will be replaced by online companies. Those traditional agencies that survive will be specialised businesses that provide customers with added value".

Source: authors' own

Responses to the question regarding how the Internet and ICTs have affected the paradigm shift indicate that the experts are aware to varying degrees of the importance of these changes in Spain's tourism mediation sector. In this sense, one of the respondents stated that the information era is characterised by the large number of intermediaries, a situation known as 'hypermediation'.

The respondents also agree that certain services, such as flights and hotels, can now be reserved directly and therefore no longer require the services of an agency, thereby creating a demediation model. However, they also consider that remediation is occurring in those services whose complexity, or the customer's lack of experience, require the intervention of an intermediary. In these cases, travel agencies can specialise in the provision of services tailored to meet their customers' needs.

However, in terms of the role of the Internet and ICTs and their impact on these changes, the respondents all agree that the world wide web is the most influential factor and the one that has had the greatest impact on tourism consumers. This is attributable to several factors, namely a proliferation of intermediaries; the fact that information can now be accessed easily, quickly and free of charge; and flexibility in the creation of tourism products. As a result, travel agencies now have a different relationship with their customers, but they also have new competitors.

Finally, the tourism mediation professionals have a clear vision of the **future outlook** for travel agencies. In these uncertain times, the future of these businesses will require the redefinition of their role as intermediaries within the distribution channel. The less optimistic predict the end of classic forms of mediation via traditional travel agencies, whilst the more optimistic predict a promising long-term future for intermediaries who will occupy a key role in the distribution of tourism products and services, provided that they manage to contribute value and differentiate themselves from their competitors.

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7. CONCLUSION

The onset of the economic crisis in 2008 led tourism mediation companies in Spain to make major cost-cutting efforts in an attempt to halt falling revenue. Examples of companies that have suffered the effects of this situation are *Orizonia* which closed in early 2013, and *Viajes Barceló, Viajes el Corte Inglés* or *Globalia* which have been forced to adopt temporary redundancy measures in order to survive this situation.

In the light of this new scenario, travel agencies should channel their efforts towards the creation of new business models and ways of commercialising their products in order boost their competitiveness, whilst at the same time increasing their efficiency within the chain of value and therefore generate higher revenue and increase profitability.

The qualitative research carried out in order to analyse the transformation of the travel agency subsector in Spain as a result of the changes brought about by the application of the Internet and ICTs has revealed the following findings:

The use of the Internet and ICTs by tourism mediation companies in Spain is widespread, although their objectives and reasons for doing so vary.

Today, these tools are used widely by agencies when making and managing reservations, enabling them to adapt easily to new consumer habits, as well as providing them with an ongoing flow of direct communication with their customers. In general terms, technology developments have enabled these firms to make specific and updated offers for specialised products targeting specific customers thanks to the segmentation options these tools provide.

However, the degree of technological development varies considerably among companies: in the case of small traditional agencies, whose ICT capacity is limited, their use is practically restricted to reservations and obtaining information from the various suppliers they work with, as they do not have the capacity to undertake the clearly desirable technological adaptation. On the other hand, the analysis of online agencies reveals a very different situation, as they are based on a business model rooted in technology. As a result, digitalisation is present at all levels of the business, as well as in their dealings with customers and suppliers.

As for the respondents' opinions regarding the impact of the Internet and ICTs on the world of tourism mediation, our research revealed that in most cases they see it as a positive and very necessary factor for the current business model. Likewise, they consider it essential for agencies to adapt to the new technologies.

Their argument is based mainly on the accessibility and management of information that ICTs offer both the travel agents and their customers. The agencies have discovered new information and communication channels with their customers and suppliers as part of a new hypermediation model whereby customers have to process vast amounts of information without the required experience and guarantees. As a result, the role of the intermediary remains a very necessary one.

For travel agencies, the influence of the Internet and ICTs has brought with it the opportunity to interact with customers in new ways. It also enables them to provide better travel advice, speed up all the processes, enjoy greater visibility and increase their levels of efficiency in all their transactions. This new relational model is based on trust, in turn supported by direct communication and personalised service.

In terms of the impacts on sales, all the respondents agreed that technological tools enable them to reach a larger number of customers, and therefore indirectly increasing their sales potential. They also associate technological development with the chance to tailor products more closely to the customers' needs both in terms of time and product characteristics. However, it must once again be stressed that the potential for increased sales provided indirectly by ICTs is also closely linked to the companies' technological development and in turn to the size and type of travel agency.

In this sense, smaller agencies are required to make far greater efforts, as in most cases they have only very limited access to these tools. The situation tends to be very different in larger agencies, where generally speaking, there is far greater technological development and the objectives sought are therefore far easier to achieve as they have an

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additional sales channel. Finally, online agencies appear to have an advantage over offline companies, as they have created entry barriers to the digital world, although this situation does not seem to have affected their sales.

Access to the Internet for both consumers and travel agencies has changed the way they interact, occasionally causing a change in strategy in order to adapt to the changing circumstances. The characteristics of this change include customers' increased access to new technologies; a rise in Internet sales; a reduction in the commission paid to traditional tourism intermediaries; and an increase in the offer and distribution channels, leading to a multi-channel model. In addition to the mass media, this model also includes the use of apps, blogs, RSS, geopositioning, affiliate marketing, meta search engines and the Web 2.0.

Within this context, traditional travel agencies are aware that the digitalisation of the commercialisation and distribution of their products is increasingly becoming not merely a necessity, but also an opportunity to adapt their competitive strategy and take advantage of this new reality before their competitors do. However, the direct contact with customers that comes with traditional sales continues to be seen as an added value and an element that differentiates them from their online competitors.

The final aspect for consideration is the paradigm shift in mediation associated with the implementation of the Internet and information and communication technologies. In this sense, the experts we interviewed agreed that certain services may be reserved directly by customers thanks to their growing experience in the use of online channels and the user-friendly nature of the websites of certain suppliers. However, it is equally true that they are convinced that remediation is occurring in the case of services such as package tours where their complexity or the customers' lack of experience requires the intervention of an intermediary.

The Internet and the consequent technological development have been revealed as the most influential factors in changes to tourism mediation. The Internet has had a devastating impact on the role of traditional mediation, forcing it towards a strategy based on specialisation and added value in order to prevent its further reduction, eventual disappearance or transformation into a digital business.

In conclusion, it can be claimed that the implementation of the Internet and ICTs poses new challenges and changes for the tourism sector. These changes, which affect suppliers, intermediaries and final consumers to an identical degree, will give rise to the creation of new business structures in the near future. Furthermore, they are of particular significance for the distribution channel, which has experience major changes in terms of the sector's more traditional structures. The survival of the traditional travel agency is at risk, and they must therefore undertake actions that enable them to continue offering added value to the market, especially if they wish to remain competitive.

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