Handbook of Research on

International Travel Agency and Tour Operation Management

Handbook of Research on International Travel Agency and Tour Operation Management

Mohinder Chand Dhiman
Kurukshetra University, India

Vinay Chauhan
University of Jammu, India

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List of Contributors

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Ambardar, Ankush / *Kurukshetra University, India*........ 238
Bernardi, Monica / *University of Milano-Bicocca, Italy*........ 30
Bhatt, Vijay Prakash / *HNB Garhwal University, India*........ 116
Boora, S. S. / *Kurukshetra University, India*........ 166
Borrelli, Nunzia / *University of Milano-Bicocca, Italy*........ 30
Chand Dhiman, Mohinder / *Kurukshetra University, India*........ 1, 65
Choudhary, Farah S. / *University of Jammu, India*........ 216
Dosquet, Frederic / *Pau Business School, France*........ 48
Fouad Attallah, Nashwa / *Alexandria University, Egypt*........ 184
Gupta, Megha / *Kurukshetra University, India*........ 166
Gupta, S. K. / *HNB Garhwal University, India*........ 116
Hilaly, Hala / *Alexandria University, Egypt*........ 184
Katou, Anastasia A. / *University of Macedonia, Greece*........ 14, 65
Katsouli, Eleni F. / *University of Macedonia, Greece*........ 14
Kumar, Ravi Bhushan / *Kurukshetra University, India*........ 1
Kusum / *GNA University, India*........ 166
Malik, Himanshu / *Chandigarh University, India*........ 238, 272
Medhekar, Anita / *Central Queensland University, Australia*........ 81
Naidoo, Vannie / *University of KwaZulu-Natal, South Africa*........ 101
Panyik, Emese / *Universidade Catolica Portuguesa, Portugal*........ 133
Seraphin, Hugues / *University of Winchester, UK*........ 48
Sharma, Alka / *University of Jammu, India*........ 216
Sharma, Minky / *Chandigarh University, India*........ 272
Takele, Yezihalem Sisay / *Mekelle University, Ethiopia*........ 201
Unurlu, Çiğdem / *Trakya University, Turkey*........ 251
Vaishnava, Abhishek / *HNB Garhwal University, India*........ 116
Vieira, Patricia / *Mercado das Viagens, Portugal*........ 133
Vivek / *Kurukshetra University, India*........ 284
Zhou, Zibanai / *Midlands State University, Zimbabwe*........ 144

Table of Contents

Preface.. xviii

Chapter 1
Building Foundations for Understanding the International Travel Agency and Tour Operation 1
Mohinder Chand Dhiman, Kurukshetra University, India
Ravi Bhushan Kumar, Kurukshetra University, India

Chapter 2
The Relationship Between Competitiveness-Driven Factors and Travel and Tourism Policy: A Multilevel Study... 14
Anastasia A. Katou, University of Macedonia, Greece
Eleni F. Katsouli, University of Macedonia, Greece

Chapter 3
Sharing Economy and Sustainability in Tourism: New Challenges for the Tour Operators 30
Nunzia Borrelli, University of Milano-Bicocca, Italy
Monica Bernardi, University of Milano-Bicocca, Italy

Chapter 4
Travel Agencies and Tour Operators at KidZania: A Proactive and Innovative Approach 48
Hugues Seraphin, University of Winchester, UK
Frederic Dosquet, Pau Business School, France

Chapter 5
Idiosyncratic Deals and Organizational Performance: A Study of the Indian Travel Intermediaries Industry 65
Mohinder Chand Dhiman, Kurukshetra University, India
Anastasia A. Katou, University of Macedonia, Greece

Chapter 6
Role, Rules, and Regulations for Global Medical Tourism Facilitators 81
Anita Medhekar, Central Queensland University, Australia

Chapter 7
Insights Into South Africa's Travel Agency Sector With Respect to Service Quality........................ 101
Vannie Naidoo, University of KwaZulu-Natal, South Africa

Chapter 8
Online Travel Trade in India: Challenges and Opportunities 116
S. K. Gupta, HNB Garhwal University, India
Vijay Prakash Bhatt, HNB Garhwal University, India
Abhishek Vaishnava, HNB Garhwal University, India

Chapter 9
Online Competition in the Distribution Chain: The Retailer's Perspective 133
Patricia Vieira, Mercado das Viagens, Portugal
Emese Panyik, Universidade Catolica Portuguesa, Portugal

Chapter 10
Strategic Analysis of the Contemporary Tour Operation Industry: Insights From Emerging Economic Jurisdictions 144
Zibanai Zhou, Midlands State University, Zimbabwe

Chapter 11
Perception of Inbound Tour Operators of India Towards Marketing Strategies of Ministry of Tourism 166
S. S. Boora, Kurukshetra University, India
Kusum, GNA University, India
Megha Gupta, Kurukshetra University, India

Chapter 12
Organizational Barriers to Knowledge-Sharing: Evidence From Egyptian Tourism Companies 184
Mahmoud Ahmed Aboushouk, Pharos University in Alexandria, Egypt
Hala Hilaly, Alexandria University, Egypt
Nashwa Fouad Attallah, Alexandria University, Egypt

Chapter 13
The Role of Public and Private Sector for Sustainable Tourism and Hospitality Business Development in Ethiopia: A Case Study in Addis Ababa 201
Yezihalem Sisay Takele, Mekelle University, Ethiopia

Chapter 14
Content Analysis of Online Visual Merchandising for Indian Online Travel Agents: A Case of Makemytrip and Yatra 216
Farah S. Choudhary, University of Jammu, India
Alka Sharma, University of Jammu, India

Chapter 15
Impact of Consumer-Generated Content (CGC) on Travel-Related Decisions 238
Ankush Ambardar, Kurukshetra University, India
Himanshu Malik, Chandigarh University, India

Chapter 16
Marketing Strategies of Travel Agencies and New Technologies Used for the Marketing Strategy .. 251
Çiğdem Unurlu, Trakya University, Turkey

Chapter 17
E-Marketing as a Tool to Achieve Competitiveness in Travel Trade Industry 272
Himanshu Malik, Chandigarh University, India
Minky Sharma, Chandigarh University, India

Chapter 18
Sustainable Tourism Development in North India: Perception of Tourism Stakeholders.................. 284
Vivek, Kurukshetra University, India

Glossary 300

Compilation of References 307

Related References 360

About the Contributors 385

Index 391

Detailed Table of Contents

Preface..xviii

Chapter 1
Building Foundations for Understanding the International Travel Agency and Tour Operation 1
Mohinder Chand Dhiman, Kurukshetra University, India
Ravi Bhushan Kumar, Kurukshetra University, India

International tourism is a global phenomenon that has experienced rapid growth during the last two decades, particularly in the developed countries of the world. Travel agencies and tour operation have become a pivotal aspect of the tourism industry. To help explain how, where, and why travel agency and tour operation have developed through the ages, its importance and significance in modern society, this chapter defines and builds an understanding. Thus, this chapter helps us understand the scale and extent of the growth in travel agencies and the tour operation business globally. Moreover, the chapter explores the historical perspectives, operational practices, and emerging typology of the travel agency.

Chapter 2
The Relationship Between Competitiveness-Driven Factors and Travel and Tourism Policy: A Multilevel Study.. 14
Anastasia A. Katou, University of Macedonia, Greece
Eleni F. Katsouli, University of Macedonia, Greece

Drawing on the resource-based view, this study examines the impact of environmental-driven, infrastructure-driven and resources-driven factors on travel and tourism policy and enabling conditions. Using a multilevel sample of 136 economies categorized in 15 geographical areas, and conducting a multilevel path analyses, we find that ICT readiness and ground and port infrastructure are the most important factors that predict the travel & tourism policy and enabling conditions construct. Based on these findings, which underline the meaning of competitiveness, the study has several theoretical and practical implications.

Chapter 3
Sharing Economy and Sustainability in Tourism: New Challenges for the Tour Operators 30
Nunzia Borrelli, University of Milano-Bicocca, Italy
Monica Bernardi, University of Milano-Bicocca, Italy

The chapter focuses on the growing importance that the sustainability issue is gaining in tourism and on the increasing research of sustainable forms of tourism among travelers, looking to the relation with the emerging market of the sharing economy. Three streams of literature are merged: the contemporary tourists, the sustainable tourism and the sharing economy. This triangulation allows reflecting on the challenges that tours operators and in general the traditional tourism sector have to face in order to maintain their position on the market while accomplishing the sustainable goals. The analysis of three case studies, peer-to-peer platforms from South Korea, Italy, and the USA, favors the identification of some preliminary suggestions.

Chapter 4
Travel Agencies and Tour Operators at KidZania: A Proactive and Innovative Approach 48
Hugues Seraphin, University of Winchester, UK
Frederic Dosquet, Pau Business School, France

The role of tour operators (TOs) and travel agents (TAs) are putting together transport, events, attractions, accommodation and food / drink into a package and are then selling them to customers. The authors introduce in this chapter a new marketing strategy for TOs and TAs, as there is fierce competition in the retail environment. The approach offers an alternative to the existing marketing and distribution channel in the industry. The KidZania concept in itself is very strong from a marketing point of view due to its high capacity to convince customers. Also, with KidZania, TOs and TAs have an opportunity to 'breed' ethical tourists, that is to say, tourists that respect their host, their environment, and culture. That said, the KidZania model could be said to be a form of manipulation of emotions, by pushing the children to behave and consume the way we would like them to.

Chapter 5
Idiosyncratic Deals and Organizational Performance: A Study of the Indian Travel Intermediaries Industry 65
Mohinder Chand Dhiman, Kurukshetra University, India
Anastasia A. Katou, University of Macedonia, Greece

The purpose of this study is to examine the mediating mechanism of idiosyncratic deals (i-deals) content (e.g., task, career, flexibility) in the relationship between core self-evaluations - CSE (e.g., efficacy, esteem, stability, locus of control), employee outcomes (e.g., motivation, commitment, work engagement and organizational citizenship behavior), and the mediating mechanism of employee outcomes in the relationship between i-deals and organizational performance (e.g., productivity, growth, creativity). The hypotheses of the study were tested with the application of structural equation modelling on data collected from 141 employees working in 17 companies operating in the Indian travel intermediaries industry. The findings show that i-deals content positively and partially mediate the relationship between CSE and employee outcomes, and employee outcomes positively and fully mediate the relationship between i-deals content and organizational performance. Implications of the findings for both research and practice are discussed.

Chapter 6
Role, Rules, and Regulations for Global Medical Tourism Facilitators 81
Anita Medhekar, Central Queensland University, Australia

Global medical travel has transformed medical travel/tourism facilitator's role, making it more sophisticated and globally competitive with their presence on the internet, and providing medical tourism packages catering to patient-centered healthcare needs. The important role played by medical tourism facilitators cannot be ignored along with rules and regulations required to accredit these medical travel companies. They act as mediators between the potential patients and the private healthcare providers, physicians in the global medical tourism supply chain, along with airlines and hotel, thus, reducing a medical traveler's worries regarding surgery abroad. Facilitators assist the potential medical tourists to plan and make healthcare decisions for travelling abroad, choosing and matching the patient with the specialty hospital for surgery, country and making all travel, accommodation and visa arrangements prior to travel, coordination between doctor and patient, personal nursing attendant, follow-up care and possibility of sightseeing, rest and recovery at the host-country of treatment. Thus, the chapter examines the reasons for the growth of global healthcare through medical travel/tourism in developing countries such as India, Thailand, Mexico, Poland and Malaysia and identifies the role, rules and regulations required for accredited medical tourism facilitators to connect patients with the healthcare providers in various countries to meet specific healthcare needs.

Chapter 7
Insights Into South Africa's Travel Agency Sector With Respect to Service Quality........................ 101
Vannie Naidoo, University of KwaZulu-Natal, South Africa

Travel agencies remain important points of call for tourists wishing to travel locally or abroad. In South Africa, the Association of South African Travel Agencies (ASATA) drives the travel agency sector. The primary aim of ASATA is to maintain and further improve a sustainable and profitable sector of its members by ensuring the delivery of a professional service to the travelling consumer. This service is achievable by the travel agency or tour operators through a strong relationship and open dialogue being present with all stakeholders in the travel and tourism value chain. Since tour agencies operate in dynamic, continuously changing environments, the concept of service quality is an important strategic tool that can be used by a tour agency to retain its clients and attract new clients. Word of mouth is an excellent tool that can create brand awareness and build customer loyalty towards a tour agency. Travel agencies that provide superior quality service in those service offerings to their clients can be leaders in the travel agency sector. This chapter employs the qualitative research approach and looks at unpacking literature on the travel agency sector. Service quality in the sector in South Africa is another key theme explored.

Chapter 8
Online Travel Trade in India: Challenges and Opportunities 116
S. K. Gupta, HNB Garhwal University, India
Vijay Prakash Bhatt, HNB Garhwal University, India
Abhishek Vaishnava, HNB Garhwal University, India

India, as the second largest internet population after China with 330-370 million users which is expected to grow by at least 50 million yearly until 2020, is at the cusp of a digital revolution. Various reports show that India's revenue in the online travel booking segment amount to 569 million USD in 2018 and is expected to show an annual growth rate of 14.6% resulting in a market volume of 9,594 million USD in 2022. This article emphasizes the opportunities and challenges of online travel agencies (OTAs) particularly in India. For the success of e-tourism in India, it is essential to increase the operational efficiency of the staff and attitude/ behavior of the staff, delivery of services as committed, provision of customer data management and insurance coverage services. All of these are the keys for an excellent and prompt service delivery system and which effects the success of the online travel provider. A large youth population, changing lifestyle, plethora of travel deals and authenticated travel related information are some of the major opportunities and challenges for e-travel commerce in India. This article summarizes

information on the challenges and opportunities of Indian online travel agencies, with a conviction that India will make a huge break through and be a success story particularly in online travel retail. This study will give insight to the industry players to understand the opportunities and challenges and develop strategies for retaining more satisfied users and increasing the number of repeat customers accordingly.

Chapter 9
Online Competition in the Distribution Chain: The Retailer's Perspective 133
Patricia Vieira, Mercado das Viagens, Portugal
Emese Panyik, Universidade Catolica Portuguesa, Portugal

Until recently, travel agents have been the principal intermediary between travel suppliers and consumers, with information as their primary trade. However, changes to information and communication technology (ICT) and the beginning of the internet have the potential to allow travel suppliers and consumers to interact directly. Today, consumer websites that integrate global distribution systems (GDSs) are no longer only an emerging threat but show fierce global competition between travel agencies and tour operators worldwide. Subsequently, one of the most pertinent questions today is how local, small-scale travel agencies respond to these market changes and what practices do they use to maintain their comparative advantage and offer competitive services? However, despite the relevancy of this issue, literature is generally scarce on travel agency strategies to confront the competition of consumer websites. Thus, in order to address this question, this article provides an analysis on the advantages and disadvantages of new technologies are available to travel agencies and strategies and practices that travel agencies can use to compete with websites.

Chapter 10
Strategic Analysis of the Contemporary Tour Operation Industry: Insights From Emerging Economic Jurisdictions 144
Zibanai Zhou, Midlands State University, Zimbabwe

Tour operators and travel agencies are the fulcrum of the tour operation industry given their eminent role in the tour operation sector value chain. This chapter addresses an underrepresentation in the current tour operation discourse in the period post WW2. To put the matter into context, at the global stage, fundamental changes have occurred since the end of WW2, notably political cum socio-economic and demographic shifts, advances in education, and increases in per capita income due to dual family income among a raft of other variables. These have arguably boosted demand for packaged tour holiday. However, in spite of the highly fluid environment, there is little academic research on emerging economic jurisdictions in the TO and TAs sub-sectors' strategic intent in light of such profound developments. Very few researches have attempted to interrogate these pertinent issues in the context of emerging markets` view point. This chapter seeks to bridge this gap by analyzing how these fundamentals have informed and redefined the contours of the TO and TAs landscape. The chapter lays claim on and envisages to make theoretical contribution by advancing the frontiers of knowledge in the following specific domains of multi-destination theory, TO and TAs product development, population demographics, TO and TAs work ethic, and TO and TAs commitment to environment protection philosophy which have been understudied in the contemporary travel and tourism literature discourse.

Chapter 11
Perception of Inbound Tour Operators of India Towards Marketing Strategies of Ministry of Tourism 166
S. S. Boora, Kurukshetra University, India
Kusum, GNA University, India
Megha Gupta, Kurukshetra University, India

With the increase in travel frequency at global level, destinations compete with each other to attract tourists. The tourists have a vast array of destinations to choose from. The destinations compete at global as well as regional level. These developments in tourism bring forth the importance of marketing for a destination. The destination marketing is generally undertaken by destination marketing organizations (DMOs) which operate at national, regional as well as local level in a country. In context of India, MOT (Ministry of Tourism, Government of India) undertakes the role of a DMO and is responsible for formulation and implementation of marketing strategies to promote India as a destination at global level. Further, it is imperative to understand the perception of other stakeholder about the marketing strategies of MOT in order to recognize the effectiveness of its marketing efforts. Being co-creator of destination image, inbound tour operators are considered as the key stakeholders at the destination. The objective of this chapter is to understand the perception Indian inbound tour operators towards the marketing strategies carried out by MOT. The data for the study was collected through structured questionnaire. The findings of the study indicated that inbound tour operators perceived marketing plans adopted by Ministry of tourism were effective to position India as a tourist destination at global level. At planning stage of strategy making for promoting India as tourist destination, MOT does not seek the opinion of inbound tour operators. It is suggested that MOT should involve inbound tour operators for drawing the marketing strategies for India as they are key seller for the tourism product.

Chapter 12
Organizational Barriers to Knowledge-Sharing: Evidence From Egyptian Tourism Companies 184
Mahmoud Ahmed Aboushouk, Pharos University in Alexandria, Egypt
Hala Hilaly, Alexandria University, Egypt
Nashwa Fouad Attallah, Alexandria University, Egypt

This chapter aimed at identifying and removing knowledge-sharing organizational barriers in the Egyptian tourism companies. The deductive approach and quantitative method were employed by this study. Moreover, a semi-structured questionnaire distributed to a sample of 278 tourism companies is used for data collection purposes. Structural equation modeling (SEM) is used for data analysis. Findings revealed significant effect of organizational barriers on knowledge-sharing behavior in tourism companies' context. A set of recommendations to overcome the perceived barriers of knowledge-sharing in tourism companies was introduced.

Chapter 13
The Role of Public and Private Sector for Sustainable Tourism and Hospitality Business Development in Ethiopia: A Case Study in Addis Ababa 201
Yezihalem Sisay Takele, Mekelle University, Ethiopia

In order to achieve the objective of the study, both primary and secondary data were generated by employing qualitative (using group discussion, in depth interview, and observation) and quantitative (mainly using survey and visitor survey questionnaires) methods. Purposive and simple random sampling techniques were used to select both private and public tourism sectors and 80 samples, respectively. The quantitative data was analyzed using frequency, percentage, and mean when appropriate while qualitative data was used to triangulate and substantiate the study. The finding result shows the visitor experience on the area of transportation and accommodation is the area where Addis Ababa falls far behind. There are several areas of poor performance (supported by both visitor questionnaires during the preparation of this study). Overall, the analysis identified that the industry (the role of public and private sector for sustainable tourism development in Ethiopia) is underperforming relative to the tremendous potential value to fasten for a tourism industry in the country.

Chapter 14
Content Analysis of Online Visual Merchandising for Indian Online Travel Agents: A Case of Makemytrip and Yatra 216
Farah S. Choudhary, University of Jammu, India
Alka Sharma, University of Jammu, India

The main objective of this chapter is to investigate the effect of online visual merchandising elements and identify the relative importance of the various visual merchandising cues to consumers' visits and booking through online travel agencies. In order to examine the relative importance of the visual merchandising of Indian travel agents, two most popular online travel agents, namely Makemytrip and Yatra, were selected. The data for the content analysis was collected from 100 respondents of each website who have visited each online travel agent namely Makemytrip and Yatra at least once. The respondents were asked to browse and explore the visual merchandising cues of the website and fill in the data at the same time. A detailed content analysis was done for both the online travel agents. For comparing the web portals chi-square has been used. The comparison analysis was performed on basis of various elements in the websites, namely website logo color, website main color, number of filters, bulletin board, comparison tool bar, interaction tool, search bar tools, detail information, custom made service, refund policy indication, number of travel service, ease of payment, image position, etc. A coding sheet was developed and designed to explain the various elements of online visual merchandising for these travel agent's portal in order to perform the content analysis. Findings showed the importance of online visual merchandising cues towards online travel agency websites. It also gave implications for online travel agents on how they can use online visual merchandising to attract and appeal consumers and travelers visiting their web portal. The study also reviews an extensive literature on online visual merchandising and presents a detail understanding of online visual merchandising and its elements and how online visual merchandising can be used differently and attractively in different web portals. The result of a chi-square test shows that there is a significant difference in all the factors of online visual merchandising cues. The chapter also gives implications for online travel agents as to how online visual merchandising can be used especially in online travel portals to attract travelers. The findings of the study provide valuable information for online travel agents for developing successful online portals using various web cues that may attract and draw interest of both the online browsers as well as the customers of web travel agents.

Chapter 15
Impact of Consumer-Generated Content (CGC) on Travel-Related Decisions 238
Ankush Ambardar, Kurukshetra University, India
Himanshu Malik, Chandigarh University, India

While online portals have improved accessibility of resources and information to potential travelers and tourists, there is less existing literature about the impact of consumer-generated content on travel

decisions. The chapter has analyzed the factors of motivation for creating, accessing, and using consumer-generated content in order to have a better planned travel decision, which results in a memorable trip. The research resulted in ranking the factors of motivation for creating, accessing, and using consumer-generated content in order to identify the need of today's traveler.

Chapter 16
Marketing Strategies of Travel Agencies and New Technologies Used for the Marketing Strategy .. 251
Çiğdem Unurlu, Trakya University, Turkey

In the 21st century, increasing technological opportunities and globalization has affected tourism mobility significantly. The purpose of this study is to point out the increasing importance of travel agencies and tour operators that have important functions in the distribution of touristic products and to evaluate the marketing strategies used by travel agencies in the world today where human mobility has gained momentum. In this respect, secondary data have been used, and a critical literature review has been conducted. The marketing strategies used by travel agencies and the technologies related to these strategies have been reviewed. From this point, among the marketing strategies used by travel agencies, market segmentation strategies, growth strategies, competitive strategies, market share strategies, and product life cycle strategies have been addressed. Then, new technologies such as central reservation systems, the WAP technology, and digital broadcasting, which are used in the marketing strategies of agencies, have been evaluated. Finally, the sales techniques that agencies use in their marketing strategies have been reviewed.

Chapter 17
E-Marketing as a Tool to Achieve Competitiveness in Travel Trade Industry 272
Himanshu Malik, Chandigarh University, India
Minky Sharma, Chandigarh University, India

E-marketing allows one to do business by using online sources. This internet source is also helping the travel and trade industries in getting the growth in their business or if the business man of small-scale industries were made aware of this then they can achieve much more in their travelling business along with the valuable customers. The chapter aims at identifying components of e-marketing that provide competitiveness in travel trade industry and address the use of e-marketing components that provide competitiveness in travel and tour industries.

Chapter 18
Sustainable Tourism Development in North India: Perception of Tourism Stakeholders................. 284
Vivek, Kurukshetra University, India

The endeavor of the chapter is to inspect the perception of residents, tourists, hoteliers, and travel agents in respect to sustainable development of tourism and to study the role of tourism stakeholders in promotion of sustainable tourism in North India and to suggest the measures for promotion of sustainable tourism in the study area. Based on a survey of initially, 71 items emerged, but after survey, only 43 items were found significant. Likert-type scale values assigned, 1 to "strongly agree," 2 to "agree," 3 to "neither agree nor disagree," 4 to "disagree," and 5 to "strongly disagree," was provided to the subjects for them to use in indicating the importance of each of the 71 general sustainable tourism development statements. Of 2300, only 1380 (60%) respondents completed the questionnaires and were valid. The data are analyzed with the statistical package program for social sciences (SPSS 12 for Windows). The basic analysis and

tests utilized in this study includes descriptive-statistics analysis, factor analysis, mean and bivariate statistical procedures, etc. The study provides a strong indication that there are significant differences among tourism stakeholders on sustainable tourism development parameters. This research highlights the changes that sustainable tourism development has brought to the community and presents the various perceptions of stakeholders in this particular setting. The research demonstrates that to plan for more sustainable forms of tourism development, the subjective perspectives and the roles of all stakeholders need to be understood and integrated into a responsive planning framework.

Glossary 300

Compilation of References 307

Related References 360

About the Contributors 385

Index 391

Preface

Tour operation industry is one of the most rapidly evolving industries of the twenty-first century. The economy of many countries all over the world depends on their ability to attract visitors and maintain a distinct edge in a highly competitive market. International Travel Agency and Tour Operation Management brings together the best practices for growth, development, travel business strategies/ models and practices for the organizations to obtain a competitive management model at global level within the tourism and hospitality industries. Highlighting comparative research that explores the cross-cultural contexts and societal implications of travel agency and tour operation businesses, this book is an essential resource for professionals, researchers, academics, and students interested in a contemporary approach to promoting, managing, and maximizing profitability of travel agency and tour operation services. This collection is designed to act as a single reference source on conceptual, practical, theoretical, and managerial issues, as well as provide insight into emerging trends and future challenges experts and practitioners to stay apprised of the field's most up-to-date research within the travel agency and tour operation management discipline.

International Travel Agency and Tour Operation Management is organized into twenty distinct chapters that provide comprehensive coverage of important topics. Moreover, Prospective authors have contributed state of the art surveys, as well as in-depth discussions, on the new methods, models, approaches, tools, best practice, and new directions. A valuable insight is also provided into the concept of travel agency and tour operation research that has become imperative for tourism business enterprises in order to attain a competitive edge over competitors. It is worthy to systematically collect such new approaches, models, current thinking and resultant tools to promote their acceptance, foster further developments, and speed up their implications in tour operation industry in the digital age. We are indeed pleased to have selected 18 chapters which have provided us insightful and interesting ideas of the travel agency and tour operation research globally.

BOOK STRUCTURE

Chapter 1, "Building Foundations for Understanding the International Travel Agency and Tour Operation," by Mohinder Chand Dhiman and Ravi Bhushan Kumar sets the scene so that we can begin by defining and build an understanding the global phenomenon called 'travel agency and tour operator'. This chapter discusses the various problems of defining travel agency and tour operator and the ways in which the study of international travel agency and tour operator helps us understand the scale and extent of the growth in travel agency and tour operation business globally

In Chapter 2, The Relationship Between Competitiveness-Driven Factors and Travel and Tourism Policy: A Multilevel Study," by Anastasia A. Katou and Eleni F. Katsouli examine the impact of environmental-driven, infrastructure-driven and resources-driven factors on travel & tourism policy and enabling conditions.

Chapter 3, "Sharing Economy and Sustainability in Tourism: New Challenges for the Tour Operators," by Nunzia Borrelli and Monica Bernardi focuses on the growing importance that the sustainability issue is gaining in tourism and on the increasing research of sustainable forms of tourism among travelers, looking to the relation with the emerging market of the sharing economy.

Chapter 4, "Travel Agencies and Tour Operators at *KidZania*: A Proactive and Innovative Approach," by Hugues Seraphin and Frederic Dosquet suggests a new marketing strategy for Tour operator and Travel Agency, as there is a fierce competition in the retail environment. The approach offers an alternative to the existing marketing and distribution channel in the industry.

Chapter 5, "Idiosyncratic Deals and Organizational Performance: A Study of the Indian Travel Intermediaries Industry," by Mohinder Chand Dihman and Anastasia A. Katou examines the mediating mechanism of idiosyncratic deals content in the relationship between core self-evaluations , employee outcomes and the mediating mechanism of employee outcomes in the relationship between i-deals and organizational performance in Indian travel intermediaries industry .

Chapter 6, "Role, Rules, and Regulations for Global Medical Tourism Facilitators," by Anita Medhekar examines the reasons for the growth of global healthcare through medical travel/tourism in developing countries such as India, Thailand, Mexico, Poland and Malaysia and identifies the role, rules and regulations required for accredited medical tourism facilitators to connect patients with the healthcare providers in various countries to meet specific healthcare needs.

Chapter 7, "Insights Into South Africa's Travel Agency Sector With respect to Service Quality," by Vannie Naidoo employs the qualitative research approach and looks at unpacking literature on the travel agency sector. Service quality in the sector in South Africa is another key theme explored.

Chapter 8, "Online Travel Trade in India: Challenges and Opportunities," by S. K. Gupta, Vijay Prakash Bhatt, and Abhishek Vaishnava emphasizes on the opportunities and challenges of Online Travel Agencies (OTA's) particularly in India. For the success of e-tourism in India, it is essential to increase operational efficiency of the staff and attributes like attitude/ behavior of the staff, delivery of services as committed, provision of customer data management and insurance coverage services, which are the keys for excellent and prompt service delivery system and eventually affects the success of online travel providers.

Chapter 9, "Online Competition in the Distribution Chain: The Retailer's Perspective," by Patricia Vieira and Emese Panyik provides an analysis on the advantages and disadvantages of new technologies in the travel agency and strategies and practices that travel agencies can benefit to compete with consumer websites.

Chapter 10, "Strategic Analysis of the Contemporary Tour Operation Industry: Insights From Emerging Economic Jurisdictions," by Zibanai Zhou addresses an underrepresentation in the current tour operation discourse in the period post WW2. To put the matter into context, at the global stage, fundamental changes have occurred since the end of WW2, notably political cum socio-economic and demographic shifts, advances in education, and increases in per capita income due to dual family income among a raft of other variables.

Chapter 11, “Perception of Inbound Tour Operators of India Towards Marketing Strategies of Ministry of Tourism,” by S. S. Boora, Kusum, and Megha Gupta addresses the perception Indian inbound tour operators towards the marketing strategies carried out by Ministry of Tourism, Government of India.

Chapter 12, “Organizational Barriers to Knowledge-Sharing: Evidence From Egyptian Tourism Companies,” by Mahmoud Ahmed Aboushouk, Hala Helali, and Nashwa Fouaad employs deductive approach and quantitative method to identifying and removing knowledge-sharing organizational barriers in the Egyptian tourism companies.

Chapter 13, “The Role of Public and Private Sector for Sustainable Tourism and Hospitality Business Development in Ethiopia: A Case Study in Addis Ababa,” by Yezihalem Sisay Takele investigates the role of public and private sector for sustainable tourism and hospitality business development in Ethiopia.

Chapter 14, “Content Analysis of Online Visual Merchandising for Indian Online Travel Agents: A Case of Makemytrip and Yatra,” by Farah S. Choudhary and Alka Sharma investigates the effect of online visual merchandising elements and identify the relative importance of the various visual merchandising cues to consumer’s visits and booking through online travel agencies.

Chapter 15, “Impact of Consumer-Generated Content (CGC) on Travel-Related Decisions,” by Ankush Ambardar and Himanshu Malik analyzes the factors of motivation for creating, accessing, and using consumer generated content in order to have a better planned travel decision which results in a memorable trip.

Chapter 16, “Marketing Strategies of Travel Agencies and New Technologies Used for the Marketing Strategy,” by Çiğdem Unurlu addresses the importance of travel agencies and tour operators that have important functions in the distribution of touristic products and to evaluate the marketing strategies used by travel agencies in the world today where human mobility has gained momentum.

Chapter 17, “E-Marketing as a Tool to Achieve Competitiveness in Travel Trade Industry,” by Himanshu Malik and Minky Sharma identifies components of E-Marketing that provide competitiveness in travel trade industry and address the use of E-Marketing components that provide competitiveness in travel and tour industries.

Chapter 18, “Sustainable Tourism Development in North India: Perception of Tourism Stakeholders,” by Vivek provides a strong indication that there are significant differences among tourism stakeholders on sustainable tourism development parameters. This research highlights the changes that sustainable tourism development has brought to the community and presents the various perceptions of stakeholders in this particular setting. The research demonstrate that to plan for more sustainable forms of tourism development the subjective perspectives and the roles of all stakeholders need to be understood and integrated into a responsive planning framework.

During the recent decade, the world has witnessed global political & economic crises, rising environmental concerns, corporate social responsibility, inter connections, emerging destination management approaches, e-tourism and many more. As a result of these developments, there has been growing pressure on academicians to pay more attention to flourish the tourism and hospitality education in the volatile tourism business environment. *International Travel Agency and Tour operation Management*, as a comprehensive collection of research on current findings related to the development of interdisciplinary approaches on concepts, methodologies, tools, and applications provides researchers, administrators, and all audiences with a complete understanding of the latest advances, approaches, models, tools, technologies, applications, and concepts in tour operation industry in the digital age. The book will facilitate this need by providing strategic information and clear insights to the world-wide tour operation industry. It aims to be the leading source of information for all those interested in travel agency and tour operation management research, models, challenges, approaches, and trends as well as to cover the emerging research topics which are going to define the future of tour operation industry in the modern age.

We have been benefited from the assistance of many individuals, institutions, organisations, colleagues & friends and students; we are deeply indebted to all of them. We acknowledge our indebtedness to various scholars whose work we have cited or substantially made use of in this book. We take the privilege to express our deep and profound sense of gratitude towards chapter contributors without their support the present book could not be completed.

We feel delighted in expressing our deep sense of gratitude and indebtedness to our family members for the support and encouragement they bestowed on us during the long period study.

Finally, we would like to thank sincerely IGI-Global staff for this opportunity to edit this book and their help and support during the development of the book.

Mohinder Chand Dhiman
Kurukshetra University, India

Vinay Chauhan
University of Jammu, India

Chapter 1
Building Foundations for Understanding the International Travel Agency and Tour Operation

Mohinder Chand Dhiman
Kurukshetra University, India

Ravi Bhushan Kumar
Kurukshetra University, India

ABSTRACT

International tourism is a global phenomenon that has experienced rapid growth during the last two decades, particularly in the developed countries of the world. Travel agencies and tour operation have become a pivotal aspect of the tourism industry. To help explain how, where, and why travel agency and tour operation have developed through the ages, its importance and significance in modern society, this chapter defines and builds an understanding. Thus, this chapter helps us understand the scale and extent of the growth in travel agencies and the tour operation business globally. Moreover, the chapter explores the historical perspectives, operational practices, and emerging typology of the travel agency.

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INTRODUCTION

The field of tourism research generally, and travel agency & tour operation more specifically, has, in this age of consumption, attracted growing interest from tourism scholars and practitioners, social scientists, government policy makers, competition and tourism regulators, tourist advocacy groups, and of course travel companies themselves. Knowledge of how travel agency & tour operator perceive, develop, think and behave is the crux of this growing interest since it enables the description, analysis, prediction, and control or influence of tourism industry's production systems and the consumption environment. Both positive and normative aims are behind the interest in tourist and the research that this interest is stimulating. A positive orientation seeks to examine and understand what is, whereas a normative approach is aimed at determining what ought to be.

The travel agency and tour operation activities that comprise the tourism, hospitality and leisure sectors of the economy represent one of the largest and fastest growing segments of tourism & hospitality industry. Yet, despite a developing body of research, our knowledge and understanding of the travel agency and tour operation is not yet commensurate with the economic and social significance of the phenomenon. Indeed, travel agency and tour operation research is embryonic and is somewhat scattered across many fields of study and their respective scholarly research journals. However, as noted by many tourism scholars (Fitch, 1987; Chand, 2003; Baum, and Mudambi, 1994; Yale, 1995; Chand, & Katou, 2011; Sheldon, 1986) that there is a growing evidence of the emergence of travel agency and tour operation research as a separate scientific field in terms of academic journals, university degree programmes and scholarly conferences. Indeed, the travel agency and tour operation management as a field of study is also introduced as a core paper in the tourism and hospitality management course(s), globally.

Thus, the chapter presents international travel agency and tour operation on historical perspectives, operational practices in tour operating industry and emerging typology of travel agency. Indeed, an historic perspective stresses the dynamic and ever-changing nature of travel agency and tour operation operational & managerial activity, the subsequent chapters will highlighting the timeframes over which travel agency and tour operation management can grow and subsequently decline and reflecting changes in consumer preferences, available modes of travel and the emergence of competing destinations. The subsequent chapters also highlight the theme of continuity and change in tourism activity and demand over the years and their relationship with international travel agency and tour operation research globally.

INTERNATIONAL TRAVEL AGENCY AND TOUR OPERATION: GLOBAL HISTORICAL PERSPECTIVES

The origin & history of travel is as old as humankind on this the earth planet. Although the origin of civilizations era of travel history commenced side by side with human's travel for empire expansion, trade, commerce, religious, cultural and educational purposes to all civilizations that lived on the earth. In beginning human wants/ needs were few and simple, limited to his physical existence such as food, clothing and shelter, however with the advances in the scale of human intelligence his wants increased many folds. Gradually human require was not limited to basic needs only, but the comforts, conveniences and luxuries of life also became necessary motivation. It is clear that the man is never satisfied, as one want is achieved then another arises in its place, and under that stimulus he achieves mighty conquests over the forces of nature. In this process he attained a high degree of development in the sphere of society, culture, science and technology etc. Thus, the history of travel is closely associated with growth of human civilization.

Many scholars have demonstrated that the phenomena of tourism business are at least 2,000 years old in western world. It began when wealthy citizens of ancient Rome, deciding they would rather spend their summers away from the city, took trips to the countryside and the coast. It is believed that the people of high society were encouraged to travel through Europe on a tour from ancient Roman times through to the 17th century (Towner, 1995). During the medieval era, the curiosity in pilgrimages has increased and the organisers arranged the places to eat and sleep. It's evident that many pilgrims were keen to relax and enjoy themselves as well as visit a holy shrine. This has developed a new concept of "holiday". Similarly, people has become more health and leisure conscious during 18^{th} century began to visit the spa and seaside towns of Mediterranean coast of Europe, Asia and Africa to benefit from the spring waters, fresh air and pleasant sunny winters. On the other hand, for enrichment of knowledge educational holidays were evolved to countries such as Italy, France and Britain with the intention of studying paintings, sculptures and architecture. Several people were interested in visiting historical sites mostly located with Roman civilization in coastal parts of Mediterranean Sea. In the same manner journey to famous educational institutions in France (Paris, Montpellier), England (Oxford) and Italy (Bologna) etc became both a custom and a component of education. These trends have a profound impact on the evolution of travel middlemen .During the 18^{th} century there was growth of travel middlemen who helped the traders and others who were travelling for trade, commerce, religious and other purposes. These phenomena led to development of 'Grand Tour' concept, which were especially educational tours which started from 'Renaissance of Europe' during seventeenth and eighteenth centuries. Travel has also expended as people's leisure time has increased. In the 1700s, leisure time was available only to the richer people. Indeed, they were sometimes referred to as the 'Leisure Classes.' In 1730, the British coastal area was developed as sea-water was found to be useful to 'cure' many diseases. This resulted into the development of health 'Spa' concept. It also was in the early 1800s that steamer cruises became popular on both the rivers and the oceans.

Perhaps these factors led to evolve new players in the travel industry which were later known as travel agents and tour operators. The Cox & Kings was founded in 1758 when Richard Cox became official travel agent of the British Royal Armed Forces. Almost 100 years later, in June 1841, Thomas Cook opened the first leisure travel agency, designed to help Britons to improve their lives by seeing the world and participating in the temperance movement. In 1822, Robert Smart of Bristol, England, announced himself as the first steamship agent. The history of Travel Agency and tour operation business can be traced back to over 177 years to Thomas Cook, who while travelling from Derbyshire to Leicester thought of an idea regarding 'engaging a special train to carry the friends of temperance from Leiceter to Loughbrough and back' (Pike, 2010). In 1845, Thomas cook ran his first commercial packaged tour, complete with cost-effective railway tickets and a printed guide of the excursionist invasion on Scotland followed in 1846—1847. By the mid nineteenth century 'Holidays away from home' had become a custom for people and-Cook's initiative and organising capabilities provided the final impetus. In 1856, Cook succeeded in organising his first 'grand circular tour of the continent'. Cook's Paris excursions are the first true 'package tours'; all the details of transport, accommodation and other facilities were pre-arranged. In 1863, he was given a red-carpet welcome by hoteliers and transporters in Switzerland. In 1864, the first guided tour of Italy left England with applications for a berth for exceeding the then available capacity. Thomas Cook and sons had established their first official London office in 1865. The travel agency business kept on growing as many other travel agencies were established and contributed towards growth of the business. To facilitate the further development of travel agency and tour operation business numerous travel related concepts have been coined such as the first foreign independent tour (FIT) was introduced in 1850 by Thomas Bennett (Pike, 2010). In the year 1850, Thomas Cook diversified his travel business as a 'tour operator' and developed tourist itinerary in 1858 the American Express Company was entered the travel business. The 'inclusive escorted and grand tour' concepts were also coined by Thomas Cook in the year 1855 and 1856, respectively. Mr. Cook brought the first ever British group of tourists to India by the Peninsular and Oriental (P & O) Steamship Company in 1878. The another landmark in the growth of travel agency and tour operation business was that Thomas Cook and Sons established its offices in Bombay and Calcutta in 1880. Thereafter number of small travel agents and tour operators have started the operation of outbound and inbound tour packages.

India is a country of longest living civilization with continuous cultural traits. There were three main types of tourism mentioned in old literature; 1) Deshatan- this was travel to other countries/places for business purpose; 2) Paryatan- this was modern type tourism, and 3) Tirthatan- this was travel to religious places.

In India the religious tourism is largest type of tourism. One can just imagine that in the year January-February 2019, world's largest fair- Kumbh fair was organized in Prayagraj of Utter Pradesh state of India in which about 120 million devotees from all places of India and world were gathered. One can imagine about its logistics, its management of various modes of transportation, accommodation, food etc. This number is greater than the population of world's 190 countries. The transportation, accommodation food and other facilities are greater than the economy of 170 countries. In old period when pilgrims were visiting to different religious places, then there was a system of 'Panda system' who was taking all responsibilities of pilgrims at pilgrimage. They were arranging pilgrims stay, food, and religious performances etc. This system still exists in several religious places of India where a person can know about his forefathers who visited there about hundreds of years ago. So, this was a unique type of old travel agency in India.

OPERATIONAL PRACTICES IN TOUR OPERATING INDUSTRY: INTERNATIONAL PERSPECTIVES

Recently, economic and non-economic factors such as financial crisis, price (exchange rate) of international and domestic travel and non-economic factors such as cultural and family links, population age structure, and geopolitical stability have a profound impact on the tour operating industry. Moreover, the increased competition among tour operators has changed their focus from an almost exclusive concern with market share to the need to explicitly include performance analysis in the decision support process. Benchmarking tour operator productivity is also becoming important in the direction of evaluating sustainability and reshaping strategic initiatives.

Many researches stated that a tour operator is often described as an intermediary (Burns and Holden, 1995; Cooper et al., 1998; Kamra and Chand, 2002; Andriotis, 2003; Bastakis, Buhalis, & Butler, 2002; Davies & Downward, 1998; Enoch, 1996; Evans and Stabler, 1995; Foster, 1990; Frenmount, 1994; Gee, Chuck and Makens, 1990; Gratton and Richards, 1997; Meyer, 2003; Pearce, 1987a; Perry & Ashton, 1994; Quiroga, 1990; Reimer, 1990; Sheldon, 1986; Schuchat,1983; Williams, 1996; Yamamoto and

Gill, 1999 and Holloway 1998). According to Cooper et al. (1998) 'The principal role of intermediaries is to bring buyers and sellers together, either to create markets where they previously did not exist, or to make existing markets work more efficiently and thereby to expand market size. Further, they argued that in all industries the task of intermediaries is to transform goods and services which consumers do not want, to a product that they do want. Gregory (1985) a tour operator is the architect \ manufacturer of tourism product who assembles the tour ingredients and creates travel, creates a market, creates lead and creates an annuity by having satisfied clients who return year after year. Chand (2003 & 2006) taking more comprehensive view of tourism, stated that a tour operator is the crucial link in the distribution chain, representing the central connection between customers and providers of services and therefore having the power to influence both sides the demand and the supply, according to their interests. Thus, the product / service that a tour operator offers to the customer are the ' tour package'. Dale (2000) examines the growth and structure of the UK tour-operating industry using competitive analysis models as developed by Porter and more latterly Thurlby.

Towner (1985) stated that the 1820s and 1830s are identified as an important transition period in the development of a more formalized tourist industry. This was the time when large scale migration started from Europe to new world; i.e. to Americas, Africa, Australia and Asia. The main reasons for this migration were; industrial revolution, search for raw materials and market, cultural renaissance, exploration of new world and religious struggles among Catholics, protestants and Muslims. Towner (1995) argued that more attention should be paid to tourism's past in non-western societies and cultures and to the more ordinary and routine practices of a wider cross-section of the population. It is too simplistic to portray tourism's evolution as a geographical process of diffusion from one or two core areas and a social process of downward movement from the affluent. He also suggested several ideas for broadening research into tourism history. Walton (2009) offered a critical examination, on a global scale and from an interdisciplinary perspective, of the development and ramifications of tourism history, with special reference to coverage of the period since the eighteenth century. It assesses the current state of play in this emergent sub-discipline and suggests some avenues for its future development. Garay and Canoves (2011) assessed the value of the Tourism Area Life Cycle combined with Regulation theory when analyzing the long-term historical development of tourism. The results show how the combination of these theories can be especially practical for constructing a global model that groups tourism development by phases with its paradigmatic changes. Similarly, Verhoeven (2013) said that the genesis of tourism has in the early modern *Grand Tour*. However, some travel diaries, along with some literature from England, Germany, and France, evidence a missing link in this regard. The late seventeenth century witnessed the coming of pleasurable summer trips that were in fact poles apart from a classic *Grand Tour*. The paper seeks to restore these pleasure trips to their rightful place within the genealogy of travel and tourism. It argues that after a period of aggressive consolidation through acquisitions and mergers, a situation has arisen whereby the major tour operators maintain power over buyers and suppliers and have concurrently formed barriers to entry for new entrants. However, with the emergence of new forces, the major players face fresh challenges from virtual and niche entrants who are gaining a competitive position with the tour-operating environment

Chand (2003) examined the operational dimensions of Indian tour operators identified that Indian tour operators give more importance to, tourist-oriented product, strategic network alliances, information technology, adequate tourist plant facilities, sound quality of product, tour brochures, formal contracts product diversification and so forth. These findings indicate that there is significant difference in operational measures used by different tour operators as per level and scale of their business. Thence, the operational differences obviously will have a wide range of implications for both the managements and destinations. Sheldon (1986) argued that the US package holiday industry is polarised into large scale firms. She further stated that the market is contestable. In similar vein, Fitch (1987) presented a descriptive evidence of market power in the UK package holiday industry.

Some studies revealed that the UK package holiday industry is oligopolistic and prone to price instability (Baum and Mudambi, 1994; Meyer, 2003 and Dale, 2000). Curtin and Busby (1999) stated that tour operators have enormous purchasing power, considerable control over the distribution, economies of scale, and sale of their product in the tourism marketplace. However, these findings are based on theoretical aspects. On the other hand, some researchers used descriptive statistics and suggested that the UK industry is segmented into strategic groupings, where large firms are oligopolistic and small ones are competitive and having market shares (Evans and Stabler, 1995; and Gratton and Richards, 1997).

Davies and Downward (2001) examined the U.K. tour operator/travel agency business (1989 to 1993) with the aim of investigating the nature of competition in outbound tourism. The industry is examined using the industrial organization (IO) framework and by empirical testing using econometrics. The article argues that the IO approach can be usefully applied to this tourism sector. It is suggested that the industry can be characterized as segmented on the basis of company size. Comments follow on the relevance of these findings for industry practitioners and competition policy. Further, Dilts and Prough (2001) identified supplier pressures, changing technology and changing habits and decisions of customers as some of the changing that have caused the travel industry to become so turbulent and uncertain.

Chand and Katou (2012) investigated the strategic determinants for the selection of partner alliances in the Indian tour operator industry. Using data from 102 UK, USA, Canadian and French tour operators in India, the study revealed that there is a set of partner selection criteria that is of most importance. The study revealed that nationality of the international tour operator is the major characteristic that discriminates partner selection criteria. Alliance performance is positively associated, in a descending order, with tour package formulation efficiency, technological expertise, local operation expertise, and marketing system and status. Thus, the study indicates some clear messages to policy makers and practitioners.

George Assaf et. al. (2011) examined the efficiency of Portuguese tour operators focusing on firm size, group ownership, and mergers and acquisitions. It has been argued that changed market conditions in Europe make it hard for tour operators to achieve economies of scale and market growth without increasing firm size or being part of a more high-profile company. Taylor (1995) analysed package holiday price competitiveness in several Mediterranean destinations and concludes that Spanish hotels are price-acceptant, and he emphasises tour operators' high bargaining power. Sinclair et al. (1990) evaluated package holiday prices in Malaga and conclude that there are statistically significant price differences among UK tour operators. Similarly, Dale (2000) examined the growth and structure of the UK tour-operating industry using competitive analysis. It argues that after a period of aggressive consolidation through acquisitions and mergers, a situation has arisen whereby the major tour operators maintain power over buyers and suppliers and have concurrently formed barriers to entry for new entrants. However, with the emergence of new forces, the major players face fresh challenges from virtual and niche entrants who are gaining a competitive position with the tour-operating environment. Further, Aguiló et al. (2001) pointed out that German package holiday prices in Majorca are statistically significant price differences, unrelated with the characteristics of the package holiday. Papatheodorou (2002) examined competitiveness and efficiency-related issues for destinations in the Mediterranean region using package holiday prices and he confirms price differences among tour operators.

It is implicit among those who work in the tourist industry that tour operators dominate mass destination markets. Although numerous assertions are made regarding the importance of tour operators, little detailed research has been done on the subject. In our opinion, analyses of the tour operation industry are still in the early stages, despite the industry's relevance in most Indian markets

EMERGING OPERATIONAL DIMENSIONS: TOUR OPERATION INDUSTRY

Travel Intermediaries Industry Structure

The structure of travel intermediaries within tourism industry may be explored by examining the roles of major supply stakeholders: government; public sector agencies; corporate sector-related businesses and services; small and medium enterprises; and other service providers (where tourism is not the core business). These broad groups may be further sub-divided according to their activities, e.g. accommodation providers; tourist attractions; Travel Intermediaries.

Today, the travel intermediaries sector is characterised by a very small number of large tour operators/ travel agencies (in terms of volume carried) and a large number of very small and specialised niche operators/ travel agencies. In UK tour operation industry the major four tour operators (Thomson Holidays, Airtours, Thomas Cook and First Choice) controlled over 70% of all outbound package tours in 2018. Most of researches on tour operation industry by the scholars and industry associations indicate that the 12 companies that are the members of the FTO (Federation of Tour Operators) controlled over 90% of the market, while the remaining 10% was controlled by over 1,500 niche operators. This is a common situation in the main European generating countries. Similarly, in Germany, for example, three large operators (TUI, Thomas Cook and Rewe) controlled 85.5% of the market in 2017. The recent estimations indicate that the tour operation industry will emerge with the highest volume of passengers in order of their market-share. Most of the travel intermediaries such as Thomson Holidays, TUI, Airtours MyTravel, Thomas Cook, and First Choice will emerge big players in the tourism market. It is also observed that the recent trends in the tourism industry are economies of scale and vertical integration. The travel intermediaries employed these strategies to achieve enormous buying power and considerable control over the supply and distribution of their products. Practically, Integration refers to long-run decision-making by a travel producer, which is likely to concentrate on three main areas such as firstly, the opportunity for economies of scale (from horizontal integration); secondly, the ability to control and develop inputs and markets more closely (from vertical integration); and thirdly, the chance to use existing differential advantages to operate profitably in related fields (diagonal integration). Interestingly, integration and consolidation among the large tourism players have also strongly influenced the way in which niche operators design and market their products. With increased control over the market by the large tour operators, smaller ones have resorted to specialisation in order to stay out of the highly competitive mainstream territory.

Table 1. List of operational dimensions of tour operation

Operational dimension	Items
Tour Package Formulation Process	Economies of scale & scope
	Tourist determine the product
	Strategic network alliances
Selecting Alternative Destination(S)	Change in consumer taste
	Declining environmental conditions
	Political/economic conditions
Forces Influencing Tour Operators to add new destination/product in their itinerary	Adequate Facilities
	Professional Tour Guide
	Objective Judgment
	Subjective Judgment
Bases for Selecting Tourism Suppliers	Brand image
	Credit worthiness
	Sound quality of product (ingredients)
	Legal Requirements
Bases for Negotiation with Vendors/Suppliers	Formal Contract
	Internal contract
	Through Middlemen
Marketing Tools for New Tour Package	Tour brochures
	Strategic alliance
	Travel intermediaries
	Internet
Challenges facing Tour Operator Industry	Information technology
	Consumer sophistication
	Financial cost
	Increasing consolidation
	Political situation
	Merger and acquisition
Future Strategies of Tour Operator	Societal marketing approach
	Integration
	Product diversification
	Better quality and value for money
	Reliance on technology

Sources: Chand (2003)

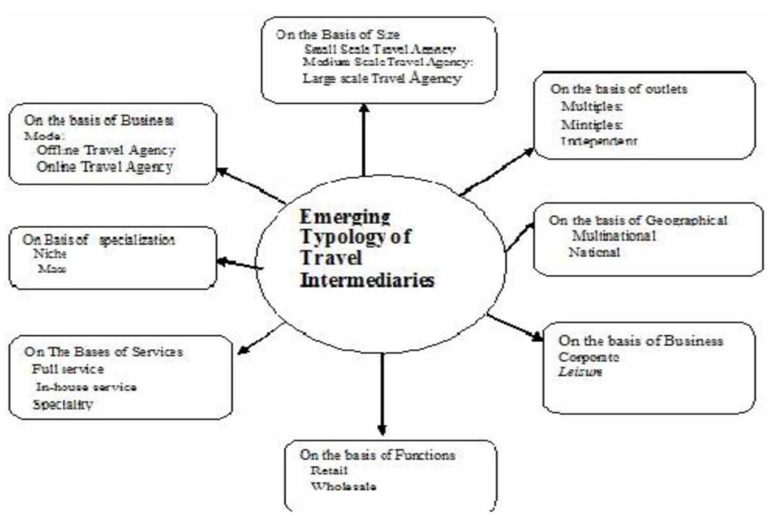
Emerging Typology of Travel Agency

Recent researches in travel intermediaries suggested that decreased transaction costs in tourism/ hospitality markets would lead to the reduction, or even extinction, of traditional intermediaries from electronic value chains. While certain types of intermediaries in certain markets may indeed face difficulties for survival, but new types of intermediaries will emerge or take over previous one. However, the discussion in the preceding sections reveals that it is very difficult to generalise on this statement. Increasing costs, competition and new typology of tourists that accompany the proliferation of information infrastructures can provide new opportunities for intermediaries. Similarly, some intermediary functions cannot be absorbed by sellers at cost/ completion, thus leaving opportunities for intermediation in electronic markets. The future of intermediaries in such volatile markets will depend not only on the type of the market, but also on the function that an intermediary serves. Figure summarises the emerging new typology of travel intermediaries along with brief operation (Chand, 2018).

CONCLUSION

We can see that the origin of travel agency and tour operation is very old. Human being started to travel since their origin as Homo sapiens on the earth. Their movements were motivated by several reasons: climatic, political, economic, social, and now leisure and business. As the civilisation developed, they needed several facilities during travel and at destinations. This was transformed and developed in modern type of Travel agency and tour operation business. It is very difficult to draw a sharp line between Travel agent and tour operator. Both are working to facilitate the travellers. The types of these travel intermediaries can be as many as the tourists, their purpose and destinations.

Figure 1.



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KEY TERMS AND DEFINITIONS

Consolidator: A consolidator is an organization who puts all the ground components of a package together. For example, bus, activities, accommodation, programming.

Mintiples: Travel agencies that focus on a particular region.

Online Travel Agency (OTA): An online travel agency can be utilized by a traveler in order to book everything they need for their trip in one place. This can include making hotel reservations, flight reservations and in-destination reservations like tours, attractions, activities.

Tour Operator: A person or company which creates and/or markets inclusive tours and subcontracts with suppliers to create a package. Most tour operators sell through travel agents and/or directly to clients.

Traditional Travel Agent: A travel agent who works out of a brick-and-mortar location, available in-person to help out people who want to plan a vacation.

Travel Agency: A travel agency is an organisation/ firm that provide travel & tourism related services to the clients.

Chapter 2
The Relationship Between Competitiveness-Driven Factors and Travel and Tourism Policy:
A Multilevel Study

Anastasia A. Katou
University of Macedonia, Greece

Eleni F. Katsouli
University of Macedonia, Greece

ANSTRACT

Drawing on the resource-based view, this study examines the impact of environmental-driven, infrastructure-driven and resources-driven factors on travel and tourism policy and enabling conditions. Using a multilevel sample of 136 economies categorized in 15 geographical areas, and conducting a multilevel path analyses, we find that ICT readiness and ground and port infrastructure are the most important factors that predict the travel & tourism policy and enabling conditions construct. Based on these findings, which underline the meaning of competitiveness, the study has several theoretical and practical implications.

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INTRODUCTION

The travel and tourism (T&T) sector is considered among the most dynamic sectors that contribute to the improvement of the labor market and the growth of an economy. In fact, research supports that for every 30 new tourists to a destination one new job is created (Crotti & Misrahi, 2017). Therefore, it is important for an economy to maintain the competitiveness of its T&T sector at high levels. Competitiveness is the set of institutions, policies and factors that determine the level of productivity of a country (WEF, 2017).

For maintaining and improving the competitiveness of the T&T sector the proper policies must be undertaken (WEF, 2017). These policies usually include prioritization (referring mainly to government expenditure and to marketing and branding to attract tourists), international openness (referring mainly to air service and regional trade bilateral agreements), price competitiveness (referring mainly to prices and taxes), and environmental sustainability (referring mainly to environmental regulations and the T&T development).

However, these policies are not considered to work in a vacuum. This is because they depend on external factors and on internal factors that may influence their applicability and efficiency. The external factors are usually categorized into three groups (WEF, 2018): Factor-driven (referring to institutions, infrastructure, macroeconomic environment, and health and primary education); Efficiency-driven (referring to higher education and training, goods market efficiency, labor market efficiency, financial market development, technological readiness, and market size); innovation-driven (referring business sophistication, and innovation). The internal factors are usually categorized into three groups (WEF, 2018): Environmental-driven (referring to business environment, safety and security, health and hygiene, human resource management and labor market, and ICT readiness); infrastructure-driven (referring to air transport infrastructure, ground and port infrastructure, and tourist service infrastructure); resources-driven (natural resources, and cultural resources and business travel).

The purpose of this study is to investigate the relationship between the T&T policy and the internal factors. In particular, first, the degree that each internal factor influences the T&T policy is examined. Then, the degree that each specific dimension in the three internal factors influences the T&T policy is examined. We consider that this is a major contribution of our study, since its results indicate the factors that the economy must attach more weight in shaping its T&T policy in order to improve the T&T sector competitiveness.

RESEARCH FRAMEWORK AND HYPOTHESES

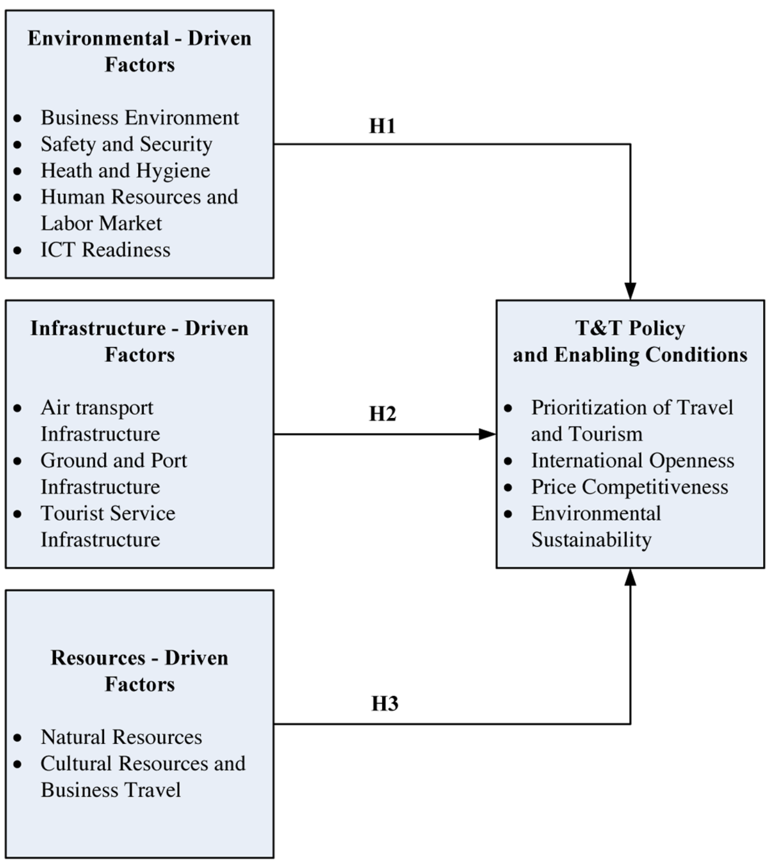
A persistent characteristic of the global economy is the increasing interdependence across and between production sectors and economies. As a result, policy dimensions and objectives constitute a key aspect that relates growth, environment and social outcomes. As such, governments are increasingly recognizing tourism to be an activity that may stimulate economies and help achieve many national economic objectives. Therefore, a key issue for economies is to understand how they can strengthen the position of their tourism sectors and remain competitive within a sustainable environmental context (Haxton, 2015).

However, tourism policy should not be considered in isolation but within its broader policy context. This means that factors that determine the T&T sector competitiveness may be inter-associated over the short, medium and long term. In other words, we may say that this inter-association creates the policy mix that shapes T&T sector competitiveness. The associative synergy between the various T&T factors is shown in Figure 1, which constitutes the research framework of the study.

Based on the 'resource-based view' of the firm, which sees an organization as gaining a competitive advantage from the resources it possesses (Barney, 1991), we hypothesize that an economy may gain competitive advantage from the resources it possesses. These resources have been presented in Figure 1 as "driving factors" and have been allocated into the three general groups (i.e. environmental, infra-structure, and natural and cultural) of the internal factors mention previously.

Environmental-driven factors may influence the T&T policy and the enabling conditions of an economy. For example, if an economy has ICT readiness, then it is very possible that it will utilize marketing and branding effectively in order to attract tourists. Similarly, ICT readiness enhances the international openness of the economy and supports price policy competitiveness by allowing more degrees of freedom in decreasing competitively taxes and prices. In addition, ICT readiness may enhance the travel and tourist industry sustainable development (Edgell, Allen, Smith, & Swanson 2008; Sigala, Airey, Jones, & Lockwood, 2004).

Figure 1. Research framework of study



Using similar reasoning with the ICT factor, the other dimensions of the enabling environment have similar effects on the T&T policy and the enabling conditions. These other dimensions are the business environment, safety and security, health and hygiene, and human resources and labor market. Accordingly, we hypothesize:

Hypothesis 1: Environmental-driven factors such as business environment, safety and security health and hygiene, human resources and labor market, and ICT readiness, positively influence prioritization of travel & tourism, international openness, environmental sustainability, and price competitiveness (in being able to decrease taxes and prices).

Infrastructure-driven factors may also influence the T&T policy and the enabling conditions of an economy. In particular, infrastructure of all types (i.e. air transport, ground and port, and tourist service) works in similar ways with ICT readiness (which could be considered to be an important infrastructure) that we saw previously (Edgell et al., 2008; Tsai, Song, & Wong, 2009). Accordingly, we hypothesize:

Hypothesis 2: Infrastructure-driven factors such as air transport, ground and port, and tourist service, positively influence prioritization of travel & tourism, international openness, environmental sustainability, and price competitiveness (in being able to decrease taxes and prices).

Resources-driven factors may also influence the T&T policy and the enabling conditions of an economy. In particular, natural resources and cultural resources and business travel work in similar ways with ICT readiness (which could be considered to be an important resource) that we saw previously (Edgell et al., 2008; Tsai et al., 2009). Accordingly, we hypothesize:

Hypothesis 3: Resources-driven factors such as natural resources and cultural resources and business travel, positively influence prioritization of travel & tourism, international openness, environmental sustainability, and price competitiveness (in being able to decrease taxes and prices).

METHOD

Sample

The study refers to 136 economies which have been grouped into 15 geographical areas as shown in Table 1. Considering that the economies involved in the study cover the vast majority of the world economies we may say that this study covers the whole population of the world economies and not just a sample.

Measures

Detailed description of the variables used in the analysis can be found in WEF (2017, p. 353-361). These variables have been developed using both subjective questionnaires and objective measures. Each variable has been developed as an index using the weighted means of the variables involved and their transformation according to a seven-level scale (1=very low to 7=very high). Thus, the existence of a possible common method bias is limited. The constructs used in the analysis are indicated:

Table 1. Travel and tourism competitiveness dimensions with respect to areas of economies

No.	Areas*	Economies	T&T Policy and Enabling Conditions	Environmental-driven factors	Infrastructure-driven factors	Resources-driven factors
			Means (standard deviations)			
1	Southern Europe	Spain, Italy, Portugal, Greece, Croatia, Malta, Turkey, Cyprus	4.52 (0.23)	5.20 (0.32)	4.69 (0.47)	3.84 (1.32)
2	Western Europe	France, Germany, United Kingdom, Switzerland, Austria, Netherlands, Belgium, Ireland, Luxemburg, Czech Republic,	4.56 (0.17)	5.80 (0.20)	5.20 (0.40)	3.65 (1.27)
3	Northern Europe	Norway, Sweden, Iceland, Denmark, Finland, Estonia, Latvia, Lithuania	4.61 (0.11)	5.84 (0.24)	4.43 (0.36)	2.46 (0.50)
4	Balkans and Eastern Europe	Slovenia, Bulgaria, Poland, Hungary, Slovak Republic, Romania, Montenegro, FYROM, Serbia, Albania, Bosnia and Herzegovina, Moldova	4.17 (0.38)	5.05 (0.23)	3.37 (0.54)	2.18 (0.55)
5	Eurasia	Russian Federation, Georgia, Azerbaijan, Kazakhstan, Kyrgyz Republic	4.05 (0.20)	4.99 (0.35)	2.95 (0.60)	2.24 (0.53)
6	North and Central America	United States, Canada, Mexico, Panama, Costa Rica, Barbados, Jamaica, Trinidad and Tobago, Dominican Republic, Guatemala, Honduras, Nicaragua, El Salvador	4.41 (0.23)	4.64 (0.56)	3.93 (0.98)	3.01 (1.20)
7	South America	Brazil, Chile, Argentina, Peru, Ecuador, Colombia, Uruguay, Bolivia, Venezuela, Paraguay	4.07 (0.32)	4.46 (0.48)	3.03 (0.46)	3.54 (1.18)
8	Middle East	United Arab Emirates, Qatar, Bahrain, Israel, Saudi Arabia, Oman, Jordan, Iran Islamic Republic, Lebanon, Kuwait, Yemen	3.91 (0.41)	5.00 (0.77)	3.69 (0.99)	1.98 (0.40)
9	North Africa	Morocco, Egypt, Tunisia, Algeria,	4.13 (0.42)	4.46 (0.21)	2.90 (0.47)	2.54 (0.52)
10	Southern Africa	South Africa, Namibia, Botswana, Zambia, Zimbabwe, Lesotho	4.09 (0.13)	4.11 (0.37)	2.75 (0.70)	2.57 (0.75)
11	Eastern Africa	Mauritius, Kenya, Tanzania, Rwanda, Uganda, Ethiopia, Madagascar, Mozambique, Malawi, Congo Democratic Republic, Burundi	3.93 (0.51)	3.86 (0.57)	2.44 (0.66)	2.37 (0.52)
12	Western Africa	Cape Verde, Cote d'Ivoire, Senegal, Gambia, Gabon, Ghana, Cameroon, Benin, Nigeria, Mali, Sierra Leone, Mauritania, Chad	3.64 (0.30)	3.77 (0.50)	2.37 (0.50)	2.00 (0.26)
13	Eastern Asia and Pacific	Japan, Australia, Hong Kong SAR, China, New Zealand, Korea Republic, Taiwan China, Mongolia	4.42 (0.34)	5.57 (0.47)	4.44 (0.98)	4.05 (1.31)
14	South-East Asia	Singapore, Malaysia, Thailand, Indonesia, Sri Lanka, Vietnam, Philippines, Lao PDR, Cambodia	4.46 (0.32)	4.76 (0.57)	3.58 (1.08)	3.12 (0.65)
15	South Asia	India, Bhutan, Nepal, Pakistan, Bangladesh	3.98 (0.50)	4.04 (0.48)	2.65 (0.62)	2.81 (1.16)
TOTAL			4.18 (0.42)	4.77 (0.79)	3.51 (1.09)	2.79 (1.17)

* Indicated by WEF (2017)

T&T Policy and Enabling Conditions: This Construct Comprised of Four Dimensions (Pillars)

- *Prioritization of Travel & Tourism* (Government prioritization of travel and tourism industry; T&T government expenditure; Effectiveness of marketing and branding to attract tourists; Comprehensiveness of annual T&T data; Timeliness of providing monthly/quarterly T&T data; Country Brand Strategy rating).
- *International Openness* (Visa requirements; Openness of bilateral Air Service Agreements; Number of regional trade agreements in force).
- *Price Competitiveness* (Ticket taxes and airport charges; Hotel price index; Purchasing power parity; Fuel price levels).
- *Environmental Sustainability* (Stringency of environmental regulations; Enforcement of environmental regulations; Sustainability of travel and tourism industry development; Particulate matter concentration; Environmental treaty ratifications; Baseline water stress; Threatened species; Forest cover change; Wastewater treatment; Costal shelf fishing pressure).

Enabling Environment: This Construct Comprised of Five Dimensions (Pillars)

- *Business Environment* (Property rights; Impact of rules on Foreign Direct Investment (FDI); Efficiency of legal framework in settling disputes; Time required to deal with construction permits; Cost to deal with construction permits; Extent of market dominance; Time required to start a business; Cost to start a business; Extent and effect of taxation on incentives to work; Total tax rate; Labor and contributions tax rate; Profit tax rate; Other taxes rate).
- *Safety and Security* (Business costs of crime and violence; Reliability of police services; Business costs of terrorism; Index of terrorism incidence; Homicide rate).
- *Health and Hygiene* (Physician density; Access to improved sanitation; Access to improved drinking water; Hospital beds; HIV prevalence; Malaria incidence).
- *Human Resources and Labor Market* (Primary education enrolment rate; Secondary education enrolment rate; Extent of staff training; Treatment of customers; Hiring and firing practices; Ease of finding skilled employees; Ease of hiring foreign labor; Pay and productivity; Female labor force participation).
- *ICT Readiness* (ICT use for business-to-business transactions; Internet use for business-to-consumer transactions; Individuals using the internet; Broadband internet subscribers; Mobile telephone subscriptions; Mobile broadband subscriptions; Mobile network coverage; Quality of electricity supply).

Infrastructure: This Construct Comprised of Three Dimensions (Pillars)

- *Air Transport Infrastructure* (Quality of air transport infrastructure; Available seat kilometres, domestic; Available seat kilometres, international; Aircraft departures; Airport density; Number of operating airlines).
- *Ground and Port Infrastructure* (Quality of roads; Quality of railroad infrastructure; Quality of port infrastructure; Ground transport efficiency; Railroad density; Road density; Paved road density (km/surface area)).

- *Tourist Service Infrastructure* (Hotel rooms; Quality of tourism infrastructure; Presence of major car rental companies; ATMs per adult population).

Natural and Cultural Resources: This Construct Comprised of Two Dimensions (Pillars)

- *Natural Resources* (Number of World Heritage natural sites; Total known species; Total protected areas; Natural tourism digital demand; Attractiveness of natural assets).
- *Cultural Resources and Business Travel* (Number of World Heritage cultural sites; Oral and intangible cultural heritage expressions; Number of large sports stadiums; Number of international association meetings; Cultural and entertainment tourism digital demand).

Data Properties

Table 1 presents means and standard deviations of the four constructs involved in the study per geographical area. Further, Table 2 presents the consistency and reliability indices and the correlation coefficients of all the constructs involved in estimation. The total variances extracted (%) values from confirmatory factor analysis are higher than 50 percent, indicating acceptable survey instrument construct validity. Since all Cronbach Alphas values exceed 0.70 internal consistency is acceptable. Since the correlation coefficients are significantly smaller than one, construct discriminant validity is also acceptable (see Hair, Black, Babin, & Anderson, 2010).

Statistical Analysis

Considering the hierarchical nature of our data, with economies nested within areas, in testing the model we adopted multilevel structural equation modeling (MSEM) via Mplus (Muthen and Muthen, 2014).

Table 2. Consistency and reliability indices and correlation coefficients

Constructs	Means (standard deviations)	Consistency and Reliability		Correlation coefficients			
		Cronbah's Alpha	Total Variance Extracted (%)	T&T Policy and Enabling Conditions	Environmental-driven factors	Infrastructure-driven factors	Resources-driven factors
T&T Policy and Enabling Conditions	4.18 (0.42)	0.714	63.961	1			
Environmental-driven factors	4.77 (0.79)	0.871	70.731	0.651	1		
Infrastructure-driven factors	3.51 (1.09)	0.890	82.149	0.691	0.848	1	
Resources-driven factors	2.79 (1.07)	0.703	78.754	0.358	0.270	0.517	1

** correlation coefficients are significant at the 0.01 level (2-tailed)

We used MSEM for a number of reasons (Do, Budhwar, & Patel, 2018). First, it offers the opportunity to assess fit at the overall, between- and within- levels. Second, MSEM utilizes, via Mplus, a full information maximum likelihood estimator for all analyses. Third, MSEM is more suitable for testing hypotheses than hierarchical linear regressions (Preacher, Zhang, & Zyphur, 2011).

Table 3 presents the intra-correlation coefficients ICC(1) and ICC(2) of all the dimensions used in the study. Because ICC(1) are larger than 0.10 there is sufficient between-unit variation to justify multilevel analysis. Similarly, because ICC(2) are larger than 0.50, the constructs ensure that there is sufficient within-unit agreement to justify aggregation (for more see Klein, Bliese et al., 2000).

RESULTS

In Table 2 we observe strong, positive and significant correlations between all structural constructs, supporting the hypotheses of the study. However, results based on correlations, although interesting, may be misleading due to the interactions between several variables (Katou, Budhwar, & Patel, 2014). Therefore, in order to isolate the possible links between the variables involved in the operational model presented in Figure 1, we first examined the hypotheses individually and then we examined them simultaneously. We assessed the overall model fit following Bollen's (1989) recommendation to examine multiple indices, since it is possible for a model to be adequate on one fit index but inadequate on many others. We used the chi-square test and the normed-chi-square ratio, the root mean squared error of approximation - RMSEA, the comparative fit index - CFI, the Tucker and Lewis index – TLI, and the squared root mean residual – SRMR (for details see Hair et al., 2010).

Table 3. Travel and tourism competitiveness: intraclass correlation coefficients

Constructs	Dimensions (Pillars)	Correlations	
		ICC(1)	ICC(2)
T&T Policy and Enabling Conditions	Prioritization of travel & tourism	0.312	0.810
	International openness	0.562	0.923
	Price competitiveness	0.360	0.827
	Environmental sustainability	0.537	0.911
Environmental-driven factors	Business environment	0.339	0.829
	Safety and security	0.257	0.755
	Health and hygiene	0.803	0.976
	Human resources and labor market	0.553	0.923
	ICT readiness	0.642	0.946
Infrastructure-driven factors	Air transport infrastructure	0.428	0.876
	Ground and port infrastructure	0.521	0.912
	Tourist service infrastructure	0.584	0.927
Resources driven-factors	Natural resources	0.296	0.789
	Cultural resources and business travel	0.360	0.839

Figure 2 presents the estimation results of the environmental-driven factors and the T&T policy and enabling conditions relationship. The goodness-of-fit indexes for this model are as follows: Chi-Square = 128.742, df = 52, p = 0.000, Normed-Chi-Square = 2.476, RMSEA = 0.104, CFI = 0.875, TLI = 0.826, SRMR-within = 0.049, SRMR-between = 0.144. In general terms these fit indices support hypothesis 1. Further, considering the multilevel nature of our model we hypothesized cross-level homology. Homology refers to the degree of applying the same structural model at different levels of analysis (Kozlowski & Klein, 2000). The similar estimated structure of the within and the between dimensions of the model verifies the homology assumption for hypothesis 1.

Figure 3 presents the estimation results of the infrastructure-driven factors and the T&T policy and enabling conditions relationship. The goodness-of-fit indexes for this model are as follows: Chi-Square = 104.655, df = 26, p = 0.000, Normed-Chi-Square = 4.025, RMSEA = 0.149, CFI = 0.815, TLI = 0.702, SRMR-within = 0.047, SRMR-between = 0.139. In general terms these fit indices support hypothesis 2. The similar estimated structure of the within and the between dimensions of the model verifies the homology assumption for hypothesis 2.

Figure 4 presents the estimation results of the resources-driven factors and the T&T policy and enabling conditions relationship. The goodness-of-fit indexes for this model are as follows: Chi-Square = 36.240, df = 16, p = 0.003, Normed-Chi-Square = 2.265, RMSEA = 0.096, CFI = 0.879, TLI = 0.773, SRMR-within = 0.044, SRMR-between = 0.160. In general terms these fit indices support hypothesis 3. The similar estimated structure of the within and the between dimensions of the model verifies the homology assumption for hypothesis 3.

Figure 2. Estimation results of the environmental-driven factors and the T&T policy and enabling conditions relationship

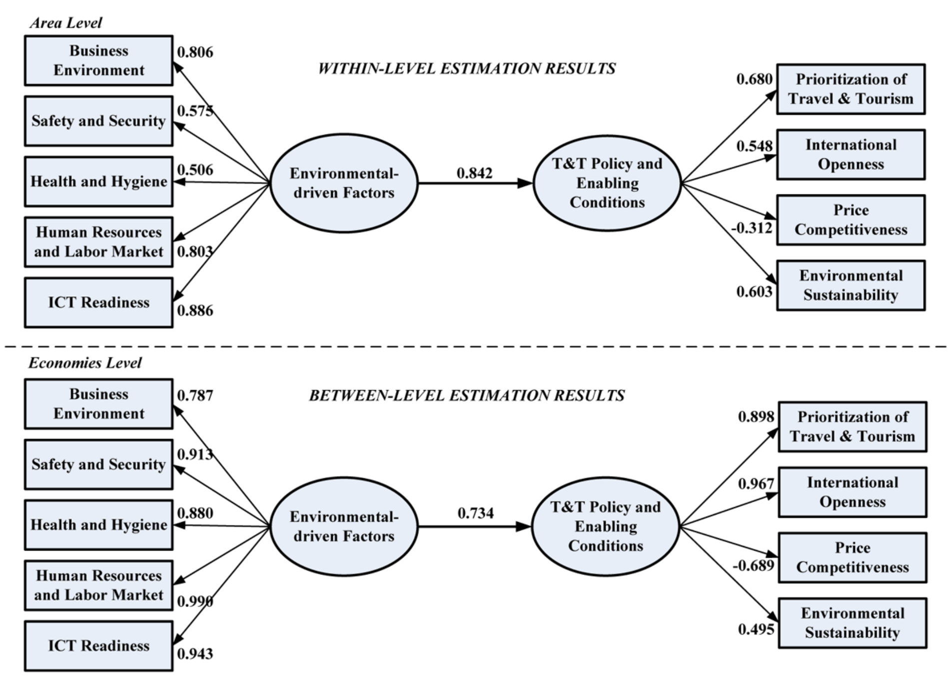


Figure 3. Estimation results of the infrastructure-driven factors and the T&T policy and enabling conditions relationship

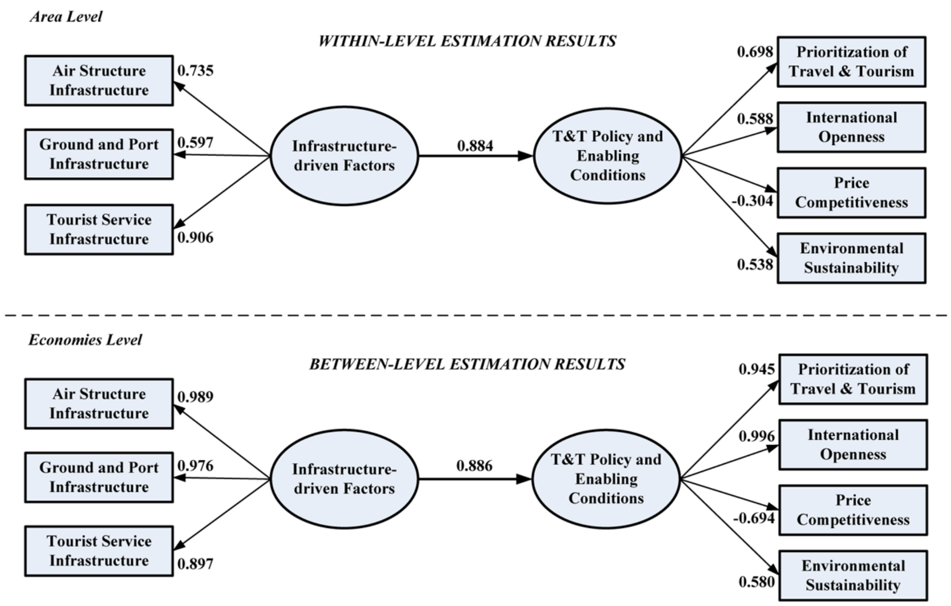
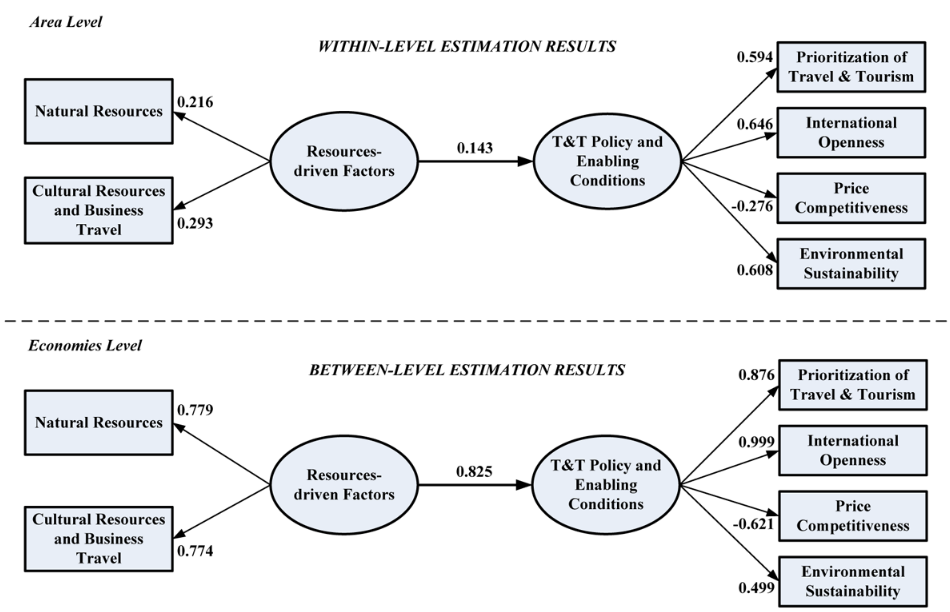


Figure 4. Estimation results of the resources-driven factors and the T&T policy and enabling conditions relationship



In figures 2 to 4 we have investigated the three hypotheses of the study individually. However, although the estimation results support these three hypotheses, this individual investigation may lead to biased results due to possible misspecification of the three individual models used in estimation. Thus, we proceeded to the simultaneous investigation of the three hypotheses referring to the model presented in Figure 1.

In particular, Figure 5 presents the estimation results of the model presented in Figure 1. The goodness-of-fit indexes for this model are as follows: Chi-Square = 725.870, df = 152, p = 0.000, Normed-Chi-Square = 4.775, RMSEA = 0.167, CFI = 0.655, TLI = 0.586, SRMR-within = 0.096, SRMR-between = 0.141. The fit indices of the complete model are inferior compared to the fit indices of the three hypotheses investigated individually. However, considering that all estimated coefficients are significant we accepted the estimation results of the complete model. Further, the similar estimated structure of the within and the between dimensions of the model verifies the homology assumption for complete model.

The results in Figure 5 support hypotheses 1, 2 and 3. Specifically, we see that in both within-level and between-level the structure of the model is the same. In other words, the homology assumption is verified again indicating that in both within-level and between-level the influence of the infrastructure-driven construct on T&T policy and enabling conditions is higher than the influence of the environmental-driven construct and the resource-driven construct. In detail, attached to the results presented in Figure 5 are the estimates of the total effects of all factors on the T&T policy and enabling conditions construct presented in Table 4.

Figure 5. Estimation results of the all purpose-driven factors and the T&T policy and enabling conditions relationship

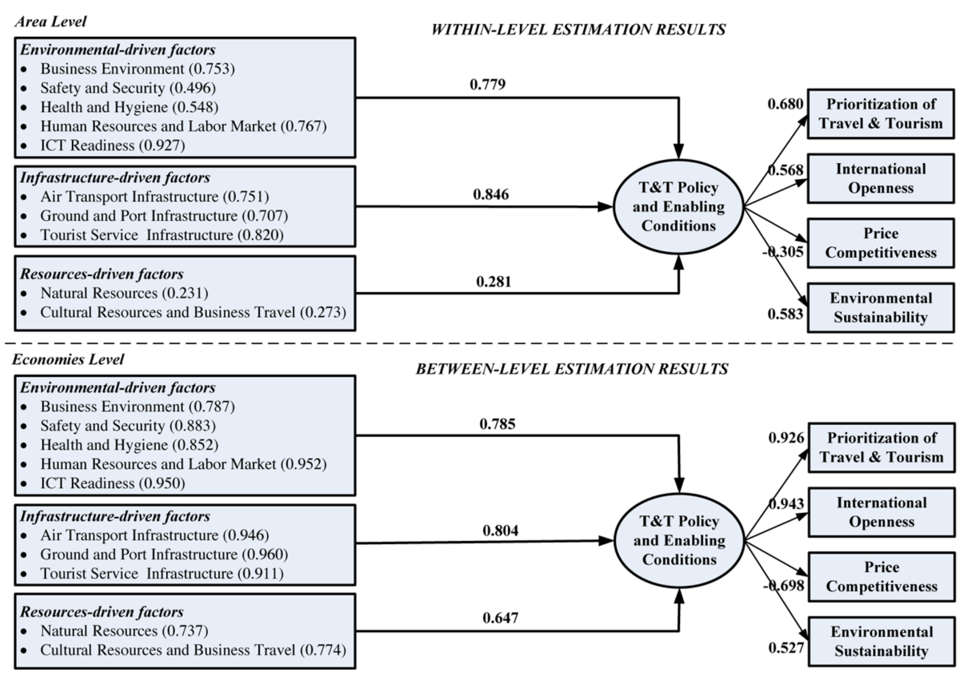


Table 4. Total effects of factors on T&T policy and enabling conditions

Constructs	Dimensions	Effects from:	
		Within-level	Between-level
Environmental-driven factors	Business environment	0.587	0.618
	Safety and security	0.386	0.693
	Health and hygiene	0.427	0.669
	Human resources and labor market	0.598	0.747
	ICT readiness	0.722	0.746
Infrastructure-driven factors	Air transport infrastructure	0.635	0.761
	Ground and port infrastructure	0.599	0.772
	Tourist service infrastructure	0.694	0.732
Resources driven-factors	Natural resources	0.065	0.477
	Cultural resources and business travel	0.077	0.501

DISCUSSION

The primary purpose of this study was to explore the effects of environmental-driven factors, infrastructure-driven factors and resources driven-factors on T&T policy and enabling conditions. In doing so, this study is among the first to examine such relationships via cross-level path analyses. In particular, by analyzing the relationships involved at both economies and areas levels, our findings reflect that the three factor-driven constructs can directly relate to T&T policy and enabling conditions. Therefore, this study augments the relevant literature and offers a number of both theoretical contributions and practical implications.

Theoretical Contributions

First, the whole study was based on data referring to competitiveness indices. Competitiveness remains still a difficult concept and depends on the various contexts referred to (Tsai et al., 2009). From a purely technical point of view and taking into consideration the hierarchical nature of our data, with economies nested within geographical areas, we adopted multilevel structural equation modeling via Mplus in testing the hypotheses. We followed this research strategy for avoiding limitations of the traditional estimation techniques (Preacher et al., 2011).

Second, according to the results in Table 4, our findings demonstrate that in terms of the within-level analysis ICT readiness is the most important factor among the environmental-driven factors that influences T&T policy and enabling conditions, tourist service infrastructure is the most important factor among the infrastructure-driven factors, and cultural resources and business travel is the most important factor among the resources driven-factors. Overall, ICT readiness is the most important factor.

Third, according to the results in Table 4, our findings demonstrate that in terms of the between-level analysis human resources and labor market (and close ICT readiness) is the most important factor among the environmental-driven factors that influences T&T policy and enabling conditions, ground and port infrastructure is the most important factor among the infrastructure-driven factors, and cultural resources and business travel is the most important factor among the resources driven-factors. Overall, the ground and port infrastructure is the most important factor.

Fourth, all findings show that the three constructs of driven factors, positively influence the T&T policy and enabling conditions construct. However, in this ultimate construct the (standardized) factor loadings of all dimensions are positive except that of the price competitiveness that is negative. This finding indicates that all the explanatory-driven factors improve price competitiveness by allowing a significant decrease in taxes and prices.

Practical Implications

Governments have the power to provide initiating activities such as business environment, safety and security, health and hygiene, human resources and labor market, ICT readiness, and air transport, ground and port and tourist service infrastructure for improving competitiveness in the travel and tourism sector (Elliott, 1997). Similarly, governments have the power to shape policies about the prioritization of travel & tourism, international openness, price competitiveness, and environmental sustainability (Scott, 2011). However, because to any initiating activity costs and benefits are attached, this study proposes that governments should put more emphasis in ICT readiness and ground and port infrastructure for shaping T&T policies, without of course excluding any other necessary activities.

LIMITATIONS

This study has two major limitations that should be acknowledged. First, the data used refer to a single point in time (year). As a result, the study does not allow for dynamic causal inferences. Second, all variables were weighted aggregates of dimensions in economies having possibly different cultural contexts. As a result, the variables may not have the same meaning.

CONCLUSION

This study advances prior knowledge by integrating both geographical areas- and individual economies-related travel & tourism competitiveness outcomes in a framework to examine the effects of the internal factors of environmental-driven, infrastructure-driven and resources-driven on T&T policy and enabling conditions construct. Overall, ICT readiness and ground and port infrastructure are the most important factors that predict the T&T policy and enabling conditions construct.

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KEY TERMS AND DEFINITIONS

Competitiveness: The set of institutions, policies and factors that determine the level of productivity of a country.

Efficiency-Driven Economies: Consider the context of higher education and training, goods market efficiency, labor market efficiency, financial market development, technological readiness, and market size.

Environmental-Driven Economies: Consider the context of business environment, safety and security, health and hygiene, human resource management and labor market, and ICT readiness.

Environmental Sustainability: Refers to regulations aiming to environmentally sustainable development.

Factor-Driven Economies: Consider the context of institutions, infrastructure, macroeconomic environment, and health and primary education.

Infrastructure-Driven Economies: Consider the context of air transport infrastructure, ground and port infrastructure, and tourist service infrastructure.

Innovation-Driven Economies: Consider the context of business sophistication, and innovation.

International Openness: Refers to air service and regional trade bilateral agreements.

Multilevel Models: Known also as nested data models or hieratical models, are models of parameters that vary at more than one level.

Price Competitiveness: Refers to competitiveness arising from policies focusing on prices and taxes.

Prioritization: Refers to government expenditure and to marketing and branding to attract tourists.

Resource-Based View: Sees an organization as gaining a competitive advantage from the resources it possesses.

Resources-Driven Economies: Consider the context of natural resources, and cultural resources and business travel.

Chapter 3
Sharing Economy and Sustainability in Tourism:
New Challenges for the Tour Operators

Nunzia Borrelli
University of Milano-Bicocca, Italy

Monica Bernardi
University of Milano-Bicocca, Italy

ABSTRACT

The chapter focuses on the growing importance that the sustainability issue is gaining in tourism and on the increasing research of sustainable forms of tourism among travelers, looking to the relation with the emerging market of the sharing economy. Three streams of literature are merged: the contemporary tourists, the sustainable tourism and the sharing economy. This triangulation allows reflecting on the challenges that tours operators and in general the traditional tourism sector have to face in order to maintain their position on the market while accomplishing the sustainable goals. The analysis of three case studies, peer-to-peer platforms from South Korea, Italy, and the USA, favors the identification of some preliminary suggestions.

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INTRODUCTION

The chapter focuses on the increasing research of sustainable forms of tourism among travellers and relation with the emerging market of the sharing economy.

The neoliberal tourism industry (also called neo-colonialist, see Corvo, 2005) and the related mass-tourism have indeed demonstrated to be large-scale, highly focus on popular destinations and with little regard to local community (Mosedale, 2016), with major impacts on the natural and built environments and on the wellbeing and culture of host populations (UNEP& WTO, 2005). The growing attention, in the last 30 years, for the sustainability dimension represents a reaction to this impacting form of tourism and refers not only to the natural environment but also to the social, economic and cultural spheres as well as the built environment.

The idea of making tourism more sustainable finds today a new ally in the spread of the Information Communication Technologies (ITCs) (Ali & Freu, 2014) and, in particular in the emerging market of the sharing economy. What before was provided by businesses such as hotels, taxis or tour operators, today can be directly provided by individual, with a peer-to-peer approach, sharing temporarily with tourists what they own, do or know (e.g. house or car, meals or excursions) (Juul, 2017). The internet-based booking platforms used to match supply and demand facilitate the spread of alternative tourist offerings and services (Brauckmann, 2017), that appear more sustainable, low-impact, and respectful of the environment and of the local communities then the traditional tourist offer.

Nevertheless, this kind of triangulation – tourism, sustainability, sharing economy – is posing new challenges to the traditional tourism operators, which cannot ignore the effect of the peer-to-peer relations in the tourist sector and should try to gain a better understanding of the phenomenon, carrying out specific strategies to accomplish the sustainability goals and maintain their position in the market. The chapter reflects on these challenges starting from the analysis of three sharing economy platforms operating in the tourism sector and with different geographical origins. Reading the cases through the lens of the sustainability allows identifying some preliminary suggestions useful for the traditional tourist operators to face the current challenges.

THE CONTEMPORARY TOURISM BETWEEN ITCS AND SUSTAINABILITY

Features of the Contemporary Tourist

The contemporary tourists are more and more demanding and active: they put emphasis on the emotional dimension of the travel and on the opportunity to do real travelling experiences (Richards, 2001); they look for a more authentic connection with local community and increasingly reject the standardisation and commodification of tourism experiences (Day, 2017). As noted by Dredge and Gyimóthy (2015) “consuming travel is intimately bound to identity construction and narratives of authentic encounters with local culture” (p. 9). Tourists are indeed increasingly focus on the research of meaningful personal experience, memorable and unique, in which to feel completely engaged; not just a simple spectator, but an active and creative actor (Richards, 2011). A form of tourism that preserve the local cultural heritage and seek the so-called relational goods, i.e. goods that cannot be enjoyed alone (Ruisi, 2004) but “through the establishment of interpersonal relationships in which organizers are not just profit-driven, but strive to establish an atmosphere of honest and shared hospitality” (Forno & Garibaldi, 2015, p. 205).

Some authors (see Bowen & Clarke, 2009) even observe that the contemporary tourists often try to distance themselves from the concept of tourists preferring that of travellers, interpreting it as a better way of interacting cross-culturally, without creating the problems associated to the so-called mass tourism (O'Reilly, 2005). Mowforth and Munt (2015) underline 'the term traveller assumes that it is no longer a process of tourism with which the individual is engaged, but a considerably more de-differentiated, esoteric and individualized activity' (p. 136). This approach reveals the research of a cross-cultural travel, marked out by authenticity, achievement and cultural sensitivity (Week, 2012) making the contemporary tourists natural allies in the struggle for sustainability (Westerhausen & Macbeth, 2003).

This general tendency has been strengthened by the spread of the ICTs and the Internet that is giving them more tools to be proactive protagonists in the shaping of the tourist experience (Ali & Frew, 2014). As Buhalis and Law (2008) underline "the development of ICTs and particularly the Internet empowered the 'new' tourist who is becoming knowledgeable and who is increasingly seeking exceptional value for money and time. They are less interested in following the crowds in packaged tours and much keener to pursue their own preferences and schedules" (pp. 610–611).

This is more evident among Millennials[1], described by the literature (Taylor & Keeter, 2010) as confident, connected and open to change; in touristic terms, they make a massive use of technology to organize the travel experience, to obtain information directly from their peers, and to enter in direct contact with locals, since they want a tailored travel that put them in connection with the local environment, the local people and the local culture (Expedia-Future Foundation, 2016).

This contemporary tourist's aptitude is investigated inside the theoretical framework of the sustainable tourism (Corvo, 2005; Pazienza&Vecchione, 2006; Zabbini, 2007) and considering the emerging market of the sharing economy.

THE GROWING ATTENTION FOR THE SUSTAINABILITY DIMENSION IN TOURISM

Definition of Sustainable Tourism

Tourism is fertile ground for applying a sustainability model, representing both an opportunity for the sector as well as a solution that is coherent with the new requirements of world development. The equilibrium of a healthy environment has been for tourism, from the very outset, the primary source of development. The product offered by tourism is regeneration, the regeneration needed to break the gruelling pattern of daily routine and to restore in the individual a sense of wellbeing. It is therefore implicit that the environment, in all its natural, scenic, cultural, artistic and architectural components, represents a fundamental and highly delicate resource for tourism, with huge impact on its future. In the wake of these statements and considering the huge expansion that the tourism sector is destined for, it is crucial that all activities connected to it start treating the environmental variable as a finite resource and not an unlimited one (Zabbini, 2007).

Tourism has, in many cases,

produced potentially permanent damage to the local landscape and culture. In terms of environment it is enough to think of the sprawl of holiday resorts or large hotel structures along coastlines, the elevated *water consumption to provide for swimming pools or golf courses built in semi-deserted areas or the consequence of pollution on coral reefs as has happened, for instance, in Bali in Indonesia. In a socio-cultural context the impact of tourism can pose an equal threat, negatively affecting host communities though the progressive disintegration of their values and their cognitive and regulatory legacy, resulting from contact with tourists who appear totally disinterested in the authenticity of their destination, nor do they question the possible problems deriving from their presence. [..] Even from a merely economic perspective tourism does not necessarily bring prosperity: indeed profits deriving from the tourism industry often only benefit multinationals and the large tour operators controlling the holiday industry, with local communities at most serving as backdrops or scenery, adding the folkloric or exotic touch, or at worst excluded completely from any involvement in the holiday organisation. [..] tourism characterised solely by the consumerist dimension will inevitably create serious damage to the local ecosystem and culture which, in the best case scenarios, are trivialised and exploited (Corvo, 2005).*

Tourism, mass tourism in particular, is an economic activity with a huge environmental impact. Therefore, this sector must address the problem of the environmental sustainability of the activities that it comprises. The principles of sustainable development set out in the Brundtland Report must also be adopted by the tourism industry; this however does not fit with "the requirements of the tourist sector, given that the latter is based on the direct use of the territory and the natural resources existent in it." Because of this, starting from the 80s/90s it was deemed necessary to review the management strategies of tourism-related activities (Pazienza & Vecchione, 2006); local and international governments and the local population are those most aware of the problems deriving from tourist activities and, because of this, associations, international bodies and non-governmental organisations have been setup, international meetings have been organised, and declarations and guidelines have been compiled with the aim of promoting the adoption of policies aimed to encourage a more sustainable employment of the resources used in the tourism industry.

Key Stages in the Adoption of the Concept of Sustainability in Tourism

The first signs of interest towards a more respectful approach to local culture and the environment – crucial elements of the tourism product – can be found in the Declaration that resulted from the first World Tourism Conference, held in Manila in 1980. Indeed, article 18 of the declaration states: "Tourism resources available in the various countries consist at the same time of space, facilities and values. These are resources whose use cannot be left uncontrolled without running the risk of their deterioration, or even their destruction. The satisfaction of tourism requirements must not be prejudicial to the social and economic interests of the population in tourist areas, to the environment or, above all, to natural resources, which are the fundamental attraction of tourism, and historical and cultural sites. All tourism resources are part of the heritage of mankind. National communities and the entire international community must take the necessary steps to ensure their preservation. The conservation of historical, cultural and religious sites represents at all times and notably in time of conflict, one of the fundamental responsibilities of States". The Article 19 continues highlighting that "International cooperation in the field of tourism is an endeavour in which the characteristics of peoples and basic interests of individual States must be respected."

In September 1985 the UNWTO General Assembly held a meeting in Sofia, Bulgaria, during which the Tourism Bill of Rights and Tourist Code was drawn up, which acknowledges the importance of tourism and its positive effects on an economic, social and cultural scale, while also recognising its role in improving mutual understanding, bringing peoples closer together and, consequently, strengthening international cooperation. Because of this it was deemed necessary to establish the rights and duties of the individual states and the host communities, as well as of tourists and professionals in this sector.

In 1988 the UNWTO, based on the concept of sustainable development explained in the1987 Brundtland Report, presented its own definition of sustainable tourism: sustainable development of tourism meets the requirements of tourists and of its current host areas and at the same time protects and improves the options for the future. This must be the guiding principle for managing resources in a way that can satisfy the economic, social and aesthetic needs and simultaneously preserve cultural integrity, the fundamental equilibrium of nature, biodiversity and the support and improvement of the quality of life.

In March 1990 the Globe '90 Conference organised in Canada was "generally identified as the first international attempt to incorporate the concept of sustainable development into that of sustainable tourism" (Pazienza & Vecchione, 2006). The report that derived from the conference is called "An Action Strategy for Sustainable Tourism Development."

The turning point came in 1995 in Lanzarote (Canary Islands), where the first World Conference on Sustainable Tourism took place, and which gave rise to the Charter for Sustainable Tourism. This defines 18 fundamental principles that tourism must follow in order to be considered a sustainable activity. The key points are: respect for the environment and local cultures, equal distribution of the economic benefits that derive from tourism, cooperation on a local, national and international level. The charter also provides concrete lines of action that individual nations should undertake, also addressing private operators in the tourist sector, as well as encouraging tourists themselves to adopt patterns of tourist consumption that respect the environment and the host community.

In 1996, UNWTO, together with the World Travel and Tourism Council (WTTC) and the Earth Council, published Agenda 21 for the travel and tourism industry: towards environmentally sustainable development. This delineates, following the principles adopted after the 1992 Rio Summit, practical measures that governments and private businesses can adopt to make the tourism sector more sustainable. It recognises the importance of protecting natural and cultural resources for the travel and tourism industry, given that these constitute the core of its activities. It highlights the priority areas of intervention, defining objectives and suggesting measures to adopt for achieving sustainable tourism. According to the Agenda 21 for the travel and tourism industry "it is up to local operators, in accordance with the power they have in different nations, to establish systems and procedures that can ensure sustainability is placed at the heart of decisional processes" (Gemmiti, 2006).

That same year the Bureau International du Tourisme Social (BITS) promoted the Montreal Conference, during which an attempt was made to understand the problems and the prospects of social tourism, a tourism model that is non-discriminatory and aims at integration and which, therefore, becomes the basis on which to build sustainable tourism since it lends itself to social cohesion (article 4).

In 1997, three important international meetings took place on the subject of tourism, which in turn produced three declarations:

1. The International Conference of Environment Ministers on Biodiversity and Tourism, in Berlin 1997, resulting in the Declaration on Biological Diversity and Sustainable Tourism.
2. The First International Conference in Calvià that led to the Declaration on Tourism and Sustainable Development in the Mediterranean
3. The Manila Declaration on the Social Impact of Tourism, promoted by the UNWTO.

Without going into the actual details contained in the above mentioned documents, it should be emphasised that the 1997 Manila Declaration reiterates the importance of formulating a global ethical tourism code, reason for which, in 1999, the UNWTO General Assembly meeting held in Santiago del Chile, drew up the Global Code of Ethics for Tourism with the aim of promoting a global approach to tourism that is fair, responsible, sustainable and accessible to all, where benefits are shared by all sectors of society, in context of an open and free international economy.

In April 1999, the United Nations Commission on Sustainable Development put into relation Tourism and Sustainable Development (Decision 7/3). According to this document the travel and tourism sector can bring economic, ecological and social development because it has less impact on natural resources and the environment compared to most other industries; moreover, local culture and heritage and the natural environment are what motivate travel and therefore the tourism industry is incentivised to protect these assets.

In 200,1 the principles of the Lanzarote Charter were reviewed and updated in the Rimini Charter resulting from the Second International Conference for Sustainable Tourism during which particular attention was given to mass tourism destinations in coastal areas and fragile environments. In countries where tourism is 'mature' it is necessary to rethink the models and strategies for territorial and tourist development; innovate the tourist product on offer by giving value to identity, cultural diversity and local products, as well as to the local human and economic resources.

2002 was a very important year for sustainable tourism: it was designated International Year of Ecotourism and Quebec City hosted the World Ecotourism Summit promoted by the UNWTO and UNEP, during which guidelines and methodologies were provided for the development of ecotourism[2]. In that same year the international community got together in Johannesburg for the 2nd World Summit on Sustainable Development, during which the programme for Sustainable Tourism - Eliminating Poverty was presented.

It was only with the 2002 Earth Summit in Johannesburg that tourism became an important subject matter even in context of international agreements: notably the Plan of Implementation resulting from the conference "promotes the development of sustainable tourism, including non-consumerist tourism and ecotourism, [..] and increase the benefits from tourism resources for the population in host communities while maintaining the cultural and environmental integrity of the host communities and enhancing the protection of ecologically sensitive areas and natural heritages. Simultaneously it is necessary to promote sustainable tourism development and capacity building in order to contribute to the strengthening of rural and local communities."

In August 2002, Cape Town (South Africa) hosted the International Conference on Responsible Tourism in Destinations, which identified the characteristics that tourism must have to be considered responsible.

The following year, in 2003, Djerba held the First International Conference on Climate Change and Tourism that recognised the close link between the tourism sector and climate change. The Declaration that resulted from this international meeting urges governments of countries interested in the contribution that tourism can give to sustainable development, to undersign all agreements on the subject, especially the Kyoto Protocol. It was additionally established that hotels, tour operators, travel agents, transport companies and the entire tourism industry must be encouraged, also through tax incentives or technical support, to adjust their activities with the aim of reducing as much as possible their contribution to climate change. This can occur by employing technologies that are more efficient and cleaner in terms of energy consumption, by using renewable energy sources, as well as with the implementation of policies for the sustainable management of water resources and for the conservation of ecosystems.

In 2007, the international community gathered in Switzerland and signed the Davos Declaration with the aim of addressing the global challenge of climate change which also involves the tourism sector, given that "climate is a key resource for tourism and the sector is highly sensitive to the impacts of climate change and global warming." For this reason, the tourism sector must react quickly to climate change, contributing actively to mitigating greenhouse gas emissions that derive primarily from means of transport and accommodation.

Later in 2008 the Global Sustainable Tourism Criteria were presented. In 2009, the 18th UNWTO General Assembly approves the Roadmap for Recovery to see the tourism sector through the 2008-2009 global economic crisis and in 2010 the UNGA adopted the resolution 65/173 on Promotion of ecotourism for poverty eradication and environment protection.

In 2012, the UNGA adopted resolution 67/223 on the Promotion of ecotourism for poverty eradication and environment protection and in the same year in the III° World Summit for sustainable development in Rio de Janeiro, Tourism is included in the Outcome Document of RIO+20 the UN Decadal Conference on Sustainable Development, as well as the Declaration of the G20 Leaders.

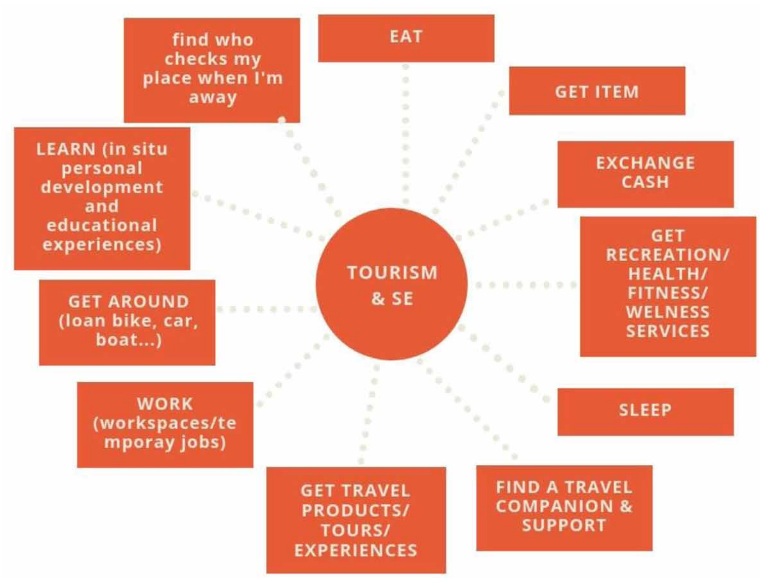
In 2014, the UN General Assembly (UNGA) adopted by consensus, resolution 69/233 on Promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection, community development and the protection of biodiversity.

In December 2016, the UNGA adopted, by consensus, resolution 71/240 on Promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection building on the report_submitted by UNWTO in July 2016, which provided an update on sustainable tourism policies and practices worldwide since the issue of the previous report on the subject in 2014.

Travelling in the Sharing Economy Age

The emergence of the so-called sharing economy is fuelling a stronger use of the digital infrastructures in the organization and management of travel. ICTs are indeed making possible new solutions and alternative services based on peer-to-peer exchanges (OECD, 2016) impacting also on the tourist market. As remembered by Samuel Nadler (2014), the sharing economy has expanded the overall supply of travel options transforming idling assets, dead capital and latent expertise in new tourist solutions and opening, in this way, to a new tourist entrepreneurship (Koopman et al., 2015). Hotels, taxis and tour operators are today flanked by new peer-to-peer services not possible before the spread of the Internet: through online platforms people can temporarily share with tourists what they own (their houses, spare rooms, cars) or what they know or do (i.e. meals or excursions), providing an easy access to a wide range of services and experiences, often more valuable and more affordable than those provided by the traditional tourist market (Botsman & Rogers, 2010). The following figure[3] shows the potential extent of collaborative opportunities in tourism from the consumer's perspective.

Figure 1. Collaborative opportunities in tourism from the consumer's perspective



The opportunity to share is opening to more affordable, more flexible, more customizable services, offering more connection among travellers, and increasing trust and visitor satisfaction thanks to peer-to-peer feedback systems, interactive communication structures and transparency in transactions.

Economic saving, environmental care and socialization are the three main benefits recognized to the sharing economy in general (Botsman & Roger, 2010; Schor, 2016; Hamari et al., 2016; Böckera & Meelen, 2017). Also, at tourist level, the main levers that attract people in the use of the sharing platforms are the environmental factors (sustainable consumption versus the impacting neoliberal tourism industry) (Mosedale, 2012), the importance of the community, and the economic and technological aspects (Andreotti et al., 2017; Markiewicz et al., 2016). Such access-based economy business models are indeed becoming more and more attractive within the tourism and the hospitality industry, since they allow the tourist to organize and manage the travel autonomously, saving money, relying on the peer information, respecting the local community of the travel destination, and finding original experiences normally not provided by the traditional tour operators. More specifically, besides the preferences of the contemporary tourist that make the use of peer-to-peer platforms in tourism so attractive, their success is also related with:

- The redundancy in existing tourism systems: see the already mentioned dead capital, idling assets and latent expertise, such as empty apartments, spare rooms and couches, local knowledge and expertise, unused assets… that can be monetised by offering them on the sharing economy platforms, and in this way recirculated with effects in sustainable and economic terms.
- The high cost of transaction and distorted information between market actors in the traditional tourism sector that reduce trust and visitor satisfaction, while increasing costs (Dredge and Gyimóthy, 2015). On the contrary the transparency offered by the peer-to-peer platforms increases the availability of niche and specialised products, including the return of "genuine" cross-cultural encounters (Yannopoulou, 2013).

- The asymmetric regulation that has impeded innovation and created an inhospitable hospitality industry (Ritzer, 2007), favoring only some producers and restricting the entry of new entrepreneurs and ideas into the market (Koopman et al., 2015).

From this scenario we realize that the spread of the sharing economy platforms in tourism is opening new challenges for the traditional tourist services which risk to lose their competitive position (Skalska, 2017).

METHODOLOGY

The chapter illustrates some examples of "tourist sharing platforms" able to connect tourists with the local community of the place visited, strengthening the sustainability dimension.

A first methodological step was to deepen three streams of literature: that related with the contemporary tourist; the literature on sustainable tourism; and third, that on the sharing economy phenomenon. Additionally, we used a case-study methodology, particularly useful when dealing with an area and issues with little theory available (Kohn, 1996); moreover, according to Yin (1994) this type of methodology is more powerful for explanatory purposes.

For the selection of cases we started from the assumption that today the main sectors impacted by the sharing economy are hospitality and transport (Vaughan &Daverio, 2016). The European Commission report "The Sharing Economy: Accessibility Based Business Models for Peer-to-Peer Markets" (Dervojeda, 2013) found that of those who use one sharing category, 71 percent shared transportation and 20 percent shared travel accommodation. Platforms such as Airbnb, Uber and Lyft are gaining momentum and increasing their businesses. Nevertheless, their recent developments open several doubts about the authenticity of these platforms in terms of adhesion to the original values that generated the sharing economy itself (mutual support, reduction of consumption and waste, social bonds community building) (Srnicek, 2016; Kenney & Zysman, 2016). The sustainability dimension seems to be overridden by their profit orientation. For this reason, we decided to focus on less famous platforms which manifestly care for people, community and environment. They are growing in number and spreading all over the world touching different types of services. For this reason, we choose three platforms with different geographical origins: South Korea, Italy and United States. In the selection we considered the sector of belonging and the type of offerings/services provided.

For the case-study analysis we relied on online institutional materials provided by the three companies and on the grey-literature collected surfing the web; these materials allowed us to collect information about the main activities and services offered by the three platforms; in addition, their web portals have been tested to gain a deeper and clearer understanding of the peer-to-peer matching system that they provide.

CASE STUDIES

The platforms identified are the South Korean *LetsPlayPlanet*, the Italian *GuideMeRight* and the American *Vayable*. The following table shows the specific offer categories of each platforms.

Table 1. Sharing economy categories in tourism

	LetsPlayPlanet	*GuideMeRight*	*Vayable*
Eat	X	X	X
Get item			
Exchange cash			
Get recreation/health/fitness/wellness services	X	X	X
Sleep			
Find a travel companion and support	X	X	X
Get travel products/tours/experiences	X	X	X
Work			
Get around			
Learn	X	X	X
Find someone that control the house when the owner is travelling			

The three both operate in the categories that we labelled as "Learn", "Get travel/ products/ tours/ experiences", "Find a travel companion and support", "Get recreation/health/fitness/wellness services" and "Eat."

Going more in detail:

- LetsPlayPlanet is a South Korean platform launched in 2012 by a team of young entrepreneurs led by Sun Me Seo, former co-founder of *Traveller's Map*, the first Korean social enterprise in the tourist industry. The main slogan of the platform is '*Travel with Locals and Play for Social Change*': the idea is that every traveller can be a change-maker while travelling if has the opportunity to experience an authentic journey during which support the local economy, meet new friends and become aware of the local context. The platforms operate in Korea, Japan, Indonesia, Malesia, Philippines and Nepal, with an expanding community that gathers responsible travellers interested in care of the planet (Bernardi &Ruspini, 2018). It is a community marketplace for sustainable tourism that makes sustainable the travel connecting who travels with local people. As one can read on the website: "it is an online platform that creates offline social impact. By experiencing an authentic and local journey both travellers and hosts develop an intercultural understanding, partake in supporting the local economy, raise awareness and of course make new friends!" The main offers are local travel guide services with a special focus on environmental and social projects. The platforms propose experiences related with the local culture, local and culinary traditions, the preservation of natural sites, explorations…. The offer is divided in "Explore the World – find authentic local experiences" and "Local Projects"; the former promotes responsible travels, journeys with meaning; the latter promotes the local partners initiatives. The mission consists indeed of three crucial P's: people, places, planet. The platform promotes micro-entrepreneurialism, and engages in developing skills, ideas and projects lead by local individuals and groups. All the local projects hold a social, economic and ecological dimension. It's possible to use the platform both as local host and traveller looking for an experience.

- GuideMeRight is an Italian marketplace active throughout Italy that connects travellers with local people, offering the opportunity to discover and book authentic experiences but also collect useful information on the destination. It was launched by Luca Sini, co-founder of the EDGAR Smart Concierge too (a service of digital concierge that allows accommodation facilities to quickly create their own App to meet all customer needs before, during and after the stay). The people who offer the service are called Local Friends, to stress the concept that "knowing a place with someone in the area is always something else", in this sense GuideMeRight highlights in particular the dimension of the local connection.They propose original experiences, out of the circuits of classic tourism; all things that otherwise not all tourists and those interested could live or see. In return they receive a small payment, decided in advance: each experience has a price that usually ranges from 5 to 20 euros, with higher peaks for exclusive services. As for the previous platform, payment is made online, without the use of cash; at the end of the experience, the startup issues an occasional service invoice, which can be included in the income tax return at the end of the year, making the activity in compliance with the Italian law. It is possible to apply as local friend or use the platform to find local experiences.
- Vayable is an American platform founded in 2011 by the young Jamie Wong. It is a global peer-to-peer marketplace for unique experiences offered by everyday people, individuals (vetted "insiders") that can monetize their time, expertise and passion for their city, connecting with consumers that can enjoy richer, personalized alternatives to existing experiences; the "insiders" can act like agents, charging fees to create tailored itineraries or book all parts of the trip. Currently its insiders offer more than 10,000 experiences in 900 cities globally and the request-based services has expanded the starting formal offering of the platform. Vayable was accepted into the famed Y Combinator accelerator program (that's graduated AirBnB, Hipmunk, and GetGoing), and has received $2.1 million in funding from prestigious sources, such as SV Angel, CrunchFund, and Youniversity Ventures.

The overview lets emerge some specific features of these platforms that match with the sustainable dimension more and more demanded to the tourist industry. As we can see in the following table the main keywords are: local community, connection, experience, relational goods and knowledge; plus environment for the specific case of LetsPlayPlanet.

Table 2. Key aspects in the case studies

	LetsPlayPlanet	***GuideMeRight***	***Vayable***
Support local communities	X	X	X
Favour local connections	X	X	X
Improve tourist experience	X	X	X
Involve relational goods	X	X	X
Strengthen the knowledge of the local heritage	X	X	X
Respect the environment	X		

It seems that the new peer-to-peer platforms have clear what stated by years of conferences and declarations about the importance of proposing a tourism respectful of the environment and local cultures, able to support an equal distribution of the economic benefits deriving from tourism, as well as cooperation on a local level (see the 1995 Charter for Sustainable Tourism). As the 1996 Montreal Conference highlighted, the social tourism has to propose a non-discriminatory tourism model that aims to integration and social cohesion becoming the basis on which to build sustainable tourism. In this sense the analysed platforms give local people the opportunity to enter in the tourist market as micro-entrepreneurs monetizing what they already know, own and do, and favouring in this way social cohesion and integration, becoming a vehicle of territorial inclusion. The type of tourism that these platforms propose wants to be fair, responsible, sustainable and accessible to all (as the 1999 the Global Code of Ethics for Tourism stated) becoming a win-win solution that benefits both travellers and local people, widening the opportunities of knowledge, connection and relations among the two worlds. Remembering the 1999 United Nations Commission on Sustainable Development we can argue that these platforms seem to have the ability to bring economic, ecological and social development, impacting less on natural resources and the environment compared to most other industries. They are able to propose a new model and new strategies that innovate the tourist product re-giving value to identity, cultural diversity and local products, as well as to the local human and economic resources (as the Rimini Charter proposed during the Second International Conference for Sustainable Tourism in 2001).

CHALLENGES AND OPPORTUNITIES: SOME CONCLUSIONS

Considering what the literature claims, it clearly emerges that tourism today is called to answer to specific requirements, that of environmental, economic and social sustainability. In the effort of reaching the sustainability goals, the traditional tour operators, as mentioned, have a crucial role: they must promote forms of tourism that are respectful of the environment, of the local populations (think of the most atrocious form of tourism, that of sexual tourism in poor areas) and of the local economic dynamics, especially for the local communities.

In a context in which the tourist has become more and more demanding and engaged in first person in the management of the travel,empowered by the new technologies, and today even moreby the sharing economy platforms that allow made-to-measure tours without seeking the services of travel mediators,the tour operators seems to be easily and potentially replaceable. Indeed, the literature claims that the sharing economyis disrupting tourism industrial systems (Zervas, Proserpio& Byers, 2013), and that it is posingincreasing concerns about its impacts on traditional tourism industrial models and stakeholders (Dredge &Gyimóthy, 2015; World Travel Market, 2014).Reading the case-studies proposed through the lens of the sustainable tourism allowed us to confirm the worries of the traditional tourism sector, that is still struggling to accomplish the standards and requests posed by 30 years of debates and indications about the issue of sustainability. While the peer-to-peer platforms seems to start exactly from the international claims, with a fresh approach dramatically closer to the sustainability dimension. In addition, it should be stressed that often the new platforms are considered unfair by the traditional operators.

From these assumptions we can advance some preliminary reflections/recommendation about the future role of the tour operators, online travel agencies and destination management operators.

First of all, the traditional tourist operators should strengthen their role of educators: they could propose itself not only as a subject that promotes travel but as a subject that builds journeys that are attentive to sustainability issues, that care for the environment and for people. A further shrewdness can be that to give information (more or less detailed according to the interest of the tourist) about how the relationship with the local community is valued in the place of destination, and how much the environment is respected. In other words, the tour operators, as highlighted by Budeanu (2003), should realize that they play significant roles in affecting changes in behaviours and attitudes towards more sustainable forms of tourism.

Further elements are more related with the specific emergence of the peer-to-peer platforms. The services offered by the new-born sharing economy platforms are different from those proposed by the traditional operators; in this sense there is no competition at all, but simply new spaces inside the market. The sharing economy services indeed integrate the more traditional offer: thanks to the involvement of private individuals they allow to fill some gaps in the market. In addition, they are able to reply to the growing demand of a tourism based on experiences and on direct contact with the local communities. The traditional operators can be inspired by the mechanisms that orient the sharing economy platforms, e.g. trust, that is the foundation of the phenomenon itself (Bootsman and Rogers, 2010) (trust that the property you are renting is clean, that the person who is hosting you is not dangerous, that the tour proposed is safe and really traditional, etc.) can be pursued and promote strengthening the visibility and transparency tools; targeting travellers is easier through Facebook and Instagram's ad manager that can create 'dark posts' or public advert and gain more visibility crossing more travellers; see the opportunity for tourism businesses: relying on alternative travel solutions, different from pre-packaged tours, allows tourists to save money for extra activities in the place of visit.

Specifically, as suggested by Toposophy[4] (2016), there are some guidelines for the traditional tourist operators that we can broadly consider as useful to face the success of the sharing economy while maintaining their competitive position and a sustainable approach. First of all it is important "get the full picture" i.e. understand how the sharing economy works in the specific destination; second: "embrace with caution" i.e. consider all the actors involved in the specific tourist fluxes and in the local offer, always "putting people first" and "building partnerships". Recently the same sharing economy platforms are recognizing the importance of rethink their model collaborating also with traditional businesses. In the same way, the traditional operators, to keep their competitive position inside the tourist market, can try to integrate the sharing economy services inside their business model, hybridise it, converging towards the new type of offer typical of the peer-to-peer platforms, considering the needs of the contemporary tourist and keeping in mind the sustainability goals.

AUTHORS' NOTE

Introduction, sections "Features of the contemporary tourist" and "The growing attention for the sustainability dimension in tourism" were written by Nunzia Borrelli. Sections "Travelling in the sharing economy age", "Methodology" and "Case studies" by Monica Bernardi. The concluding section was jointly written by the two authors.

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KEY TERMS AND DEFINITIONS

Contemporary Tourist: The current tourist who is interested in the emotional dimension of the travel, on the opportunity to do real travelling experiences based on the connection with local community, and by the refusal of the standardisation and commodification of tourism experiences. He seeks for a sustainable and tailored travel.

Sharing Economy: A new economic model that uses online platforms to match offer and demand, working in a peer-to-peer logic to connect who need with who has. In this way idling assets, dead capital and latent expertise can be recirculated opening new economic opportunities, reducing waste and consumption and favouring new forms of socialization. At tourist level it opens new opportunities and solutions often more valuable and more affordable than those provided by the traditional tourist market.

Sustainable Tourism: A form of tourism that preserves the local cultural heritage and consider as key elements the respect for the environment and the local cultures, the equal distribution of the economic benefits that derive from tourism, the cooperation on a local, national and international level.

Sustainability: A more respectful approach to local culture and the environment that is not prejudicial to the social and economic interests of the population in tourist areas, to the environment or, above all, to natural resources.

Travel: The action and the experience of travelling.

Traveler: A distance from the concept of tourist; interpreted as a better way of interacting cross-culturally, without creating the problems associated to the so-called mass tourism.

Tour Operator: A company/agent that makes arrangements for travel and places to stay, often selling these together as package holidays (travel and accommodation are booked for the tourist).

ENDNOTES

[1] Boys and girls born from 1981 to 2000.

[2] The Quebec Declaration on Ecotourism contains general guidelines, as well as specific recommendations to the interested parties for the sustainable development of ecotourism.

[3] It is inspired by the categorisation proposed by Dredge and Gyimóthy (2015).

[4] Toposophy is a full-service, integrated destination marketing and management agency

Chapter 4
Travel Agencies and Tour Operators at KidZania: A Proactive and Innovative Approach

Hugues Seraphin
University of Winchester, UK

Frederic Dosquet
Pau Business School, France

ABSTRACT

The role of tour operators (TOs) and travel agents (TAs) are putting together transport, events, attractions, accommodation and food / drink into a package and are then selling them to customers. The authors introduce in this chapter a new marketing strategy for TOs and TAs, as there is fierce competition in the retail environment. The approach offers an alternative to the existing marketing and distribution channel in the industry. The KidZania concept in itself is very strong from a marketing point of view due to its high capacity to convince customers. Also, with KidZania, TOs and TAs have an opportunity to 'breed' ethical tourists, that is to say, tourists that respect their host, their environment, and culture. That said, the KidZania model could be said to be a form of manipulation of emotions, by pushing the children to behave and consume the way we would like them to.

INTRODUCTION

In the tourism industry there are different ways to segment the market. Generation is one of them. This segmentation is important as it will help Destination Marketing Organisations to better tailor their products and services (Yolal, 2018). This strategy is all part of a wider movement of organisations toward retaining their customers (customer loyalty). 'Experience' and 'emotion' are keywords in the process of customer loyalty (Chi, 2018; Roy, 2018). 'Experience' and 'emotions' happen even before the customer consume the product or service. This is what Roy (2018) called the pre-consumption experience. As a result of the narrative presented so far in this introduction, this book chapter is going to focus on children, 'not only because of their purchasing power, but due to their influence on their parents' purchasing deci-

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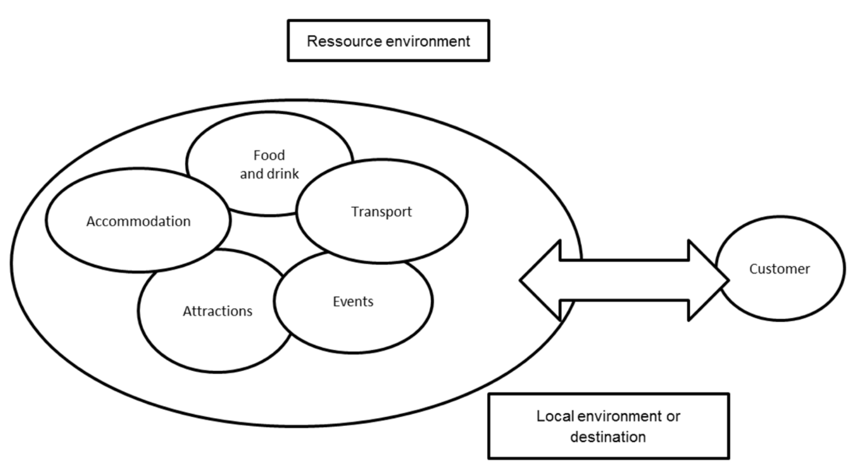
sion in any products (…). In addition, children are often viewed as potential future consumers' (Xu & Kahl, 2018, p. 354). We are also going to focus on the importance of providing them a pre-consumption experience of the industry. By so doing, we are going to use KidZania, as 'an experience design concept targeted at young people' (Beard & Russ, 2017, p. 366) as a tool, and tour operators (TOs) and travel agencies (TAs) as focus points or case studies. In this chapter we are innovating in terms of operation management and marketing management of TOs and TAs. This is important, as 'innovation is one of the key issues that affects business competitiveness' (Celtek & Ilham, 2018). That said, the KidZania model could be said to be a form of manipulation of emotions, by pushing the children to behave and consume the way we would like them to (Tagg & Wang, 2016). For Korstanje (2018) our emotions are constantly being manipulated either by dogma, the media, politics, etc.

CRITICAL ANALYSIS OF THE ROLE AND IMPORTANCE OF T.O AND T.A IN THE TOURISM INDUSTRY: A LITERATURE REVIEW

Talking about the role of TO and TA, is above talking about tourism products and even broadly, tourism market. Indeed, tourism product is defined 'as the total experience, the tourism product can be disaggregated into stages of the vacation from anticipation and planning, to booking, travel and evaluation' (Gilbert, 1990, cited in Cooper & Hall, 2008, p. 27). Another approach is to consider the tourism product as 'an amalgam of destination elements including attractions; supporting services such as accommodation and food and beverage; and transportation' (Cooper & Hall, 2008, p. 27). Both approaches of tourism product are implicitly referring to the role of TO and TA, which will be presented in the following paragraph. In a nutshell, TO and TA are putting together transport, events, attractions, accommodation and food / drink into a package and are then selling them to customers (figure 1).

The topic of 'distribution channel', that we are defining as 'a system of intermediaries, or middlemen, that facilitates the sale and delivery of tourism services from suppliers to consumers' (Buhalis & Laws, 2001, cited in Diaz, Martin-Consuegra & Esteban, 2015, p. 330) is also key here.

Figure 1. The tourism market
Source: Cooper & Hall (2008)



Travel agents (TAs) and tour operators (TOs) are retailers and as such they selling a variety of products and services, among these are: tours; overseas package tours; short break holidays; flights; theatre booking; car hire; cruising holidays; rail tickets; coach holidays and tickets; travel insurance; foreign exchange and finally, visa and passport applications; making reservation; planning itineraries; calculating fares and charges; advising clients; dealing with customer complaints (Halpern & Graham, 2013; Page, 2013; Youell, 1998). The role of the TAs changed throughout the years. When they first started TAs, they were mainly independent agents and their main role was to sell tickets (for rail and sea) and accommodation. From the 1960s they became more involved in the tour operation side of travel by putting together and then selling tours. In the 1980s/1990s, many TAs merged with TOs to be more competitive nationally and internationally (Page, 2013). In the UK, 90% of travel agencies are members of Association of British Travel Agents (ABTA). In the late 1990s, Lunn Poly, Going Places, Thomas Cook, AT Mays and Co-op Travelcare, were the leading travel agencies chains (Youell, 1998). The majority of TAs are either vertically or horizontally integrated in order to be able to compete on the national and international scene. Tour Operators, also known as principals are wholesalers (Page, 2013; Youell, 1998). The role of the TOs is to put together package holidays (transport, accommodation and other services) and then sell to the public either through TAs, internet, or call centres (Page, 2013). Most of them are selling their products through TAs. A small number are selling directly to their customers. Overall, there are four main types of TOs: mass market operators; specialist operators; domestic operators and incoming tour operators (Page, 2013; Youell, 1998).TO, play an important role in the image that visitors have of a destination (Grosspietsch, 2006). Their role is therefore very important. As for the TO, some of them belong to Association of Independent Tour Operators (Youell, 1998).

Tour operation and travel retailing are a dynamic sector, that employ thousands of people; generate hundreds of billion. The UK and Germany are leading the market (Page, 2013). The figure below models the connection between TO and TA (figure 2). TUI, Thomas Cook and Going Places are the leading TOs (Page, 2013). However, throughout the time, the relation between TOs and TAs have changed. First, some TOs are now selling their product direct to customers and cutting out the travel agents. Second, the emergence of new technologies such as internet, has led to holidays being sold online through e-travel agents, once again bypassing TAs (Page, 2013).

'Travel agents will have to evaluate constantly how to protect commission levels and how to reach a highly fragmented travel market, as ICT establishes more niches. The pressure on independent travel agents in a highly competitive environment is set to continue, but new promotional tools and modes of distribution will see agents use marketing and advertising to maintain a presence' (Page, 2013, p. 213). This is therefore going to impact of TOs. In terms of marketing strategy and innovation, the following have been used: corporate rebranding; more products and services; use of technology to enhance experience and sales (Page, 2013). In this book chapter and more specifically, in the following section, we are suggesting an innovative and long-term strategy based on young consumers, in other words, children. Has multi-channel distribution (online and off line) has become the norm in tourism retail (Diaz et al., 2015), we have therefore here opted for an offline approach. In other words, we are introducing in this chapter a new marketing strategy. Distribution systems and marketing strategy are related. Indeed, 'the structure of the tourism distribution system affects not only the choices available to consumers, but also business models and marketing strategies' (Diaz et al., 2015, p. 330). As there is a fierce competition in the retail environment (Diaz et al., 2015), our approach offers an alternative to the existing marketing and distribution channel in the industry (figure 3).

Figure 2. How tour operators link the elements of a holiday together to produce, assemble and distribute the package to the consumer
Source: Page (2013)

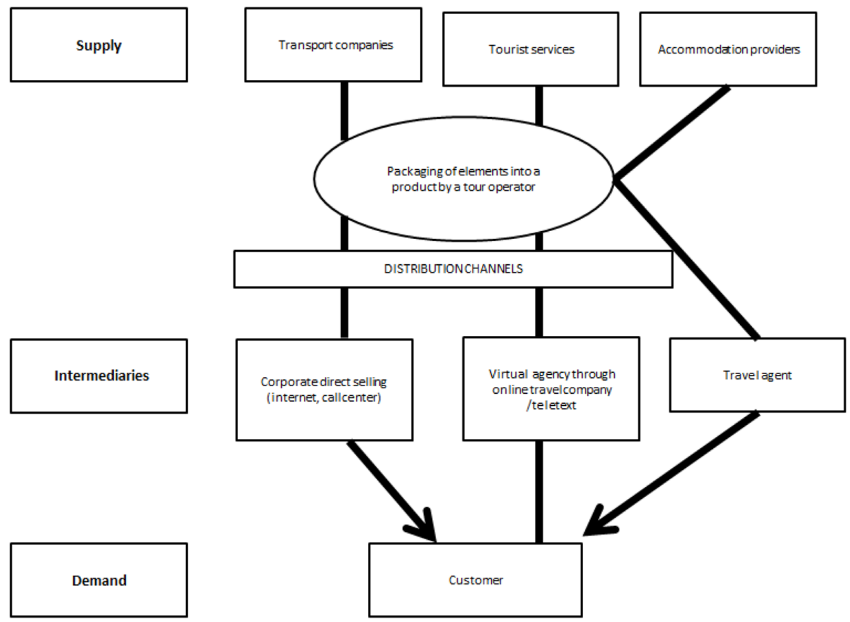
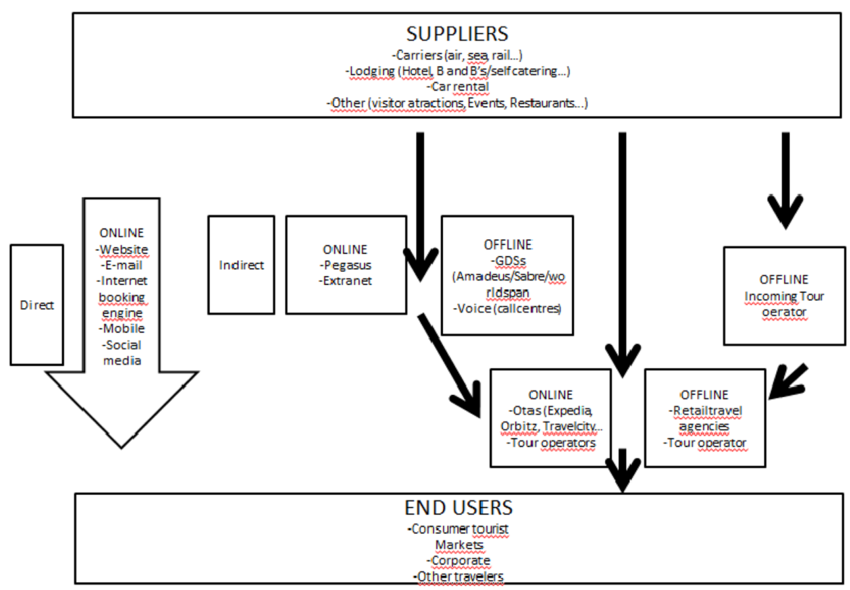


Figure 3. Tourism distribution channel
Source: Diaz et al. (2015)



Because TOs influence the long sustainability of destinations; the nature of tourism demand; instrumental in determining market trends and affect the demand levels for destinations (Carey, Gountas & Gilbert, 1997), adopting a marketing strategies and operation tactics based on children using the KidZania model should ensure the destination a long-term sustainability, a major influence of tourism demand and determining market trends.

THE INFLUENCERS OF THE TOURISM INDUSTRY

For Poria and Timothy (2014) as well as for Nickerson and Jurowski (2001), there is a scarcity of studies on children in tourism research despite the fact the industry and academics recognise the value and impact of children, and more specifically, their role in purchase decisions. As suggested by Poria and Timothy (2014) and Nickerson and Jurowski (2001), academics do not research in this area for two main reasons: First, the trend is to focus on husband and wife (i.e. parents) mainly because collecting primary data on children is difficult. Specific interviewing techniques are needed when interview children and there are stricter ethical guidelines involving informed consent from parents (or guardians), and permissions from government agencies and ethics committees. Second, children experiences are mainly researched based on testimonies provided by parents or other adults (Radic, 2017). That said, research in this area discusses children's influence on parental decision-making (Small, 2008).

Dowse, Powell and Weed (2018) highlighted the importance of children in sporting events and more generally in leisure by arguing that they are a stakeholder group with distinct needs and interests that need to be taken into account when planning events. Radic (2017) did the same but for the cruise sector, as he explained that children play a very important role in the choice of Cruise Company. For Lugosi, Robinson, Golubovskaya and Foley (2016), children are extremely important for the hospitality sector. They even refer to them as sovereign consumers and have to be seen as active decision-makers. For Lugosi et al. (2016) it seems that children are even more important than adults (parents and carers) as their satisfaction influence the satisfaction of parents and carers. This view is also shared by Cullingford (1995, p. 121), who also claimed 23 years earlier that 'as future tourists, and as a potentially important influence, their view of their experiences are significant.' As for Thornton, Shaw and Williams (1997), children are active participants or negotiators when it comes to the choice of holidays. They also explained that the influence of children lies on the fact the satisfaction of parents is largely influenced by the satisfaction of children. The influence of children on family holiday choice is not something new. In other words, it is a well-established fact. As a consequence of the importance of this segment, Lugosi et al. (2016) are explicitly claiming that it is extremely important to identify, acknowledge and meet their needs, as doing so contribute to create a positive emotion that encourage and increase loyalty and positive-word-of-mouth. By acknowledging the importance for the industry to consider the needs of children, Lugosi et al. (2016) agrees with Cullingford (1995) who claimed that the tourism industry is still not targeting directly children. Thornton, Shaw and Williams (1997, p. 287) shared the same thought as they also added that 'the role of children has been under-researched and under-valued'. Some sectors of the hospitality industry are doing well in terms of meeting the needs of the children. Among these are food service chains (restaurants, café, pubs and bars) and theme parks (such as Legoland) which are providing family-friendly servicescape by adapting the design of the venue (colour of the venue; type of food; staff attitude; facilities for children to play) to meet the needs of this segment (Johns & Gyimothy, 2002; Lugosi et al., 2016; Nickerson & Jurowski, 2001). Indeed, customers' satisfaction is a result of the products and services offered to them (Albayrak & Caber, 2015).

KIDZANIA: PRESENTATION AND CRITICAL ANALYSIS OF A MODEL

Presentation

The concept KidZania was founded in 1996. The founders wanted to offer something different for Mexican children and their families (Di Pietro, Edvardson, Reynoso, Renzi, Toni & Mugion, 2018; Lonsway, 2016). The scale-sized representation of a city was originally called 'The city of children'. It is a hybrid concept that put together on one side day care centre and entertainment for 1 to 16 years old. On the other side, it offers a new marketing media for brands. Children can earn kidzos (local currency) by 'working' at various venues (Castorena & Prado, 2013; Di Pietro et al., 2018; Lonsway, 2016). This concept has been developed in partnership with national and international brands. Among these are Coca-Cola. At KidZania, children can for instance work at Coca-Cola bottling plant and learn the process of manufacturing their own bottle of Coca-Cola (Di Pietro et al., 2018; Lonsway, 2016). In KidZania London, the partners are: Alder Hey children's hospital; Aljazeera Media Network; Bank of England; The big yellow self-storage company; British Airways; Cadbury; Dorset hospitality international; eat natural; Golden Tours; Gourmet Burger Kitchen; Global; H&M; H&M Conscious; Hamptons international; Highbrow; Innocent; Lily's Kitchen; Metro; Middlesex cricket; Mission deli; pdsa; Pokemon, Renault, Scouts; Snazaroo; Team Margot; vitabiotics; Wolwagen (KidZania London, n.d.).

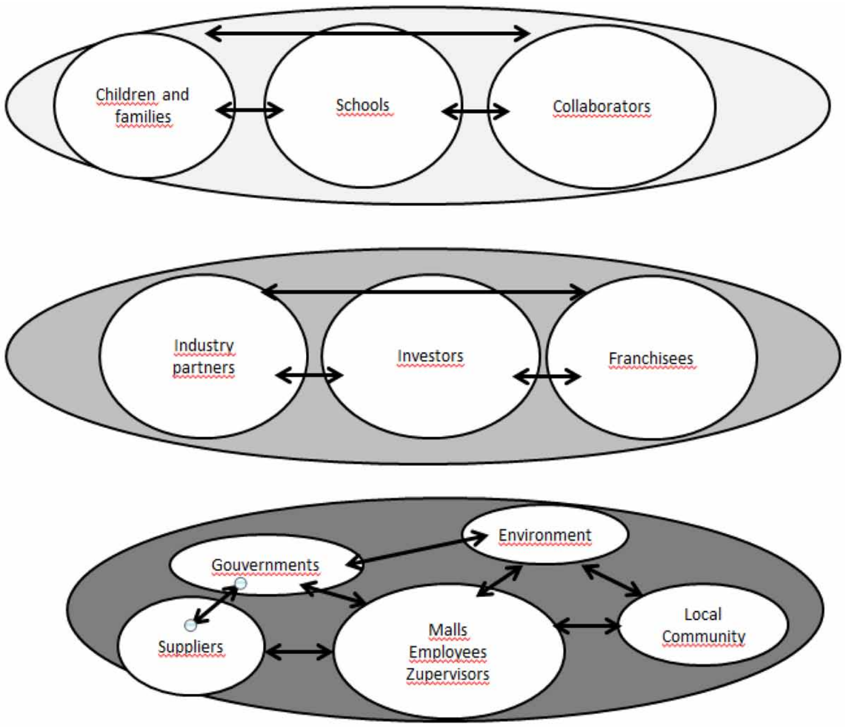
In a nutshell, the concept empowers, inspires and educates children through real life role-play activities in a safe and conductive environment (Tagg & Wang, 2016), where 'kids could play to be grownups in a wide space in which they had the tools for it' (Lopez, 2006, cited in Castorena & Prado, 2013, p. 1). In addition, Castorena and Prado (2013, p. 4) added: 'Kids are expected to acquire real life abilities and get familiar with the work environment. They learn and practice cooperation and interaction, build creativity, independence, decision-making and community-involvement.' The KidZania concept is a win-win situation: 'Marketing partners win because they can get their brand, products or services closer to kids and their families; children win because they have fun and educational place to play, learn and have a good tie and parents win because they see their kids having fun and also learning important life lessons' (Lonsway, 2016, p. 246).Kidzania has also been presented as 'an experience design concept targeted at young people' (Beard & Russ, 2017, p. 366). The concept has now been deployed across the world and operates 20 parks in 17 countries (Di Pietro et al., 2018). Different actors are involved in the KidZania concept (figure 4).

The concept could be summarised as follow:

- Involvement of a variety of stakeholders
- Win-win partnership between stakeholders
- Adaptation of the concept to the context (local and international brand)
- Balance between edutainment and advertainment

That said, it is also important to highlight the fact that 'while KidZania is marketed as a perfect world ruled by a government of children, the evidence suggest that children are merely following adults' in-

Figure 4. KidZania's service ecosystem
Source: Di Pietro et al. (2018)



structions' (Tagg & Wang, 2016, p. 154). This is due to the fact that the activities are highly structured (Tagg & Wang, 2016).

VRIO Analysis

The management of resources is extremely important for the sustainability of any tourism organisation. The VRIO model (value, rarity, imitability of resources and capabilities, and organisation - ability to exploit the resource or capability) is a useful 'resource-based view' strategic management tool for resources analysis (table 1).

Table 1. The VRIO framework

Valuable?	Rare?	Costly to imitate?	Costly to imitate?	Competitive implication
No	- - - -	- - - -	- - - -	Competitive disadvantage
Yes	No	- - - -	- - - -	Competitive parity
Yes	Yes	No	- - - -	Temporary competitive advantage
Yes	Yes	Yes	No	Unexploited competitive advantage
Yes	Yes	Yes	Yes	Sustained competitive advantage

Source: Barney, 1997 cited in Quattrociocchi et al., 2017

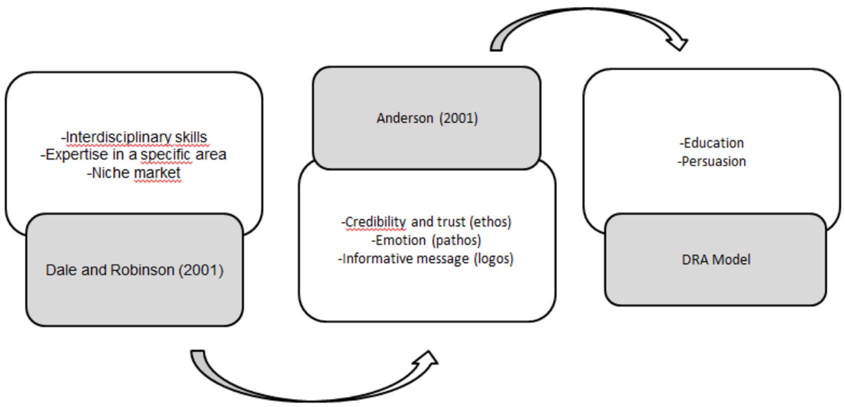
It allows an organisation to implement strategies that will improve its efficiency, effectiveness, and ability to exploit opportunities and to neutralise threats (Quattrociocchi, Mercuri, Perano & Calabrese, 2017; Simao, 2013). The most desirable scenario for an organisation is to have resources that are valuable but rare, non-substitutable, and hard to imitate. In this case, sustainable competitive advantage exists and, in terms of performance, the organisation achieves above-average returns (Simao, 2013; Hanson, Hitt, Ireland & Hoskisson, 2017). In this research, we use the VRIO model to evaluate the KidZania model (table 2).

Table 2 shows that the KidZania can provide competitive advantage to any organisation that decides to be partner. The above table also provides evidence that the concept in itself is very strong from a marketing point of view due to its high capacity to convince customers. The KidZania model to some extent follows the DRA model (Dale, Robinson and Anderson) developed by Seraphin, Ambaye, Capatina and Dosquet (2018). This model (figure 5) is the combination of two existing and complementary frameworks (Seraphin, Ambaye, Capatina & Dosquet, 2018). On the one hand, the Dale and Robinson (2001) framework, and on the other hand, the framework developed by Anderson (2001, cited in Walters & Mair, 2012).

Table 2. VRIO evaluation of KidZania model

	Valuable?	**Rare?**	**Costly to imitate?**	**Exploited by organization?**	**Competitive implication**
Children and families	**YES**	**YES**	**YES**	**YES**	**Competitive Advantage**
Schools					
Collaborators					
Industry partners					
Investors					
Franchises					
Suppliers					
Governments					
Environment					
Local community					
Employees					

Figure 5. The Dale Robinson Anderson Model (DRA Model)
Source: Seraphin et al. (2018)



APPLICATION OF THE KIDZANIA MODEL TO THE TOURISM INDUSTRY: THE CASE OF T.O AND T.A

The Travel and Tourism City for Children

The travel and tourism industry have already identified the potential of edutainment and advertainment as many organisations of the sector are already partnering with KidZania. Among these are organisations in transport like Nippon Airways, Air Asia; British Airways (KidZania London, n.d.); worldwide travel agencies (Tagg & Wang, 2016, p. 154); tour operators like Golden Tours (KidZania London, n.d.); Hospitality providers such as Dorset Hospitality International (KidZania London, n.d.).

At the moment, the edutainment and advertainment partners of KidZania cover a range of industry sector like tourism, hospitality, travel, catering; retails (clothing); car manufacturer; etc. (KidZania London, n.d.). In this book chapter we are suggesting that KidZania (instead of having random partners), could refine its concepts by having for each sector representatives at each level of the supply chain and/or distribution channel. For instance, for the tourism industry, the partners could be chosen from the sectors indicated in figure 1. TOs and TAs, would fall for instance under 'transaction'. This approach would give the children an overall understanding of how the tourism industry is structured. Children will perceive that way the central role that TO and TA play in the industry. Having TO and TA developing, promoting and selling responsible travel and holidays would contribute to the sustainability of the tourism industry, as the current children will be the tourists of the future. With KidZania TOs and TA agents have an opportunity to 'breed' ethical tourists, that is to say tourists that respect their host; their environment; culture (Hindley & Font, 2017).This concept is also an opportunity for destination marketing organisations (DMOs) of destinations with a negative image to promote a positive image of their destinations and turn them (and their family) when older into future customers. Indeed, according to Gartner (2000), the destination image can be defined as 'the attitude, perception, beliefs and ideas one hold about a particular geographic area formed by the cognitive image of a particular destination'

(Gartner, 2000, p. 295). The image tourists have of a destination is based upon information acquired either by induced agents (generally controlled by sources external to the individual such as advertisements); organic agents (that are acquired through personal experience and are normally the most trusted source of information); and autonomous agents (are media sources or popular culture such as films or documentaries). They are considered as the most powerful because they can quickly alter a tourist's image of a destination (Gartner, 1993). The KidZania model that we are suggesting could be assimilated to an organic agent. In the same line of thought, Seraphin, Butcher and Korstanje (2016) are claiming that it is important to educate at pre-visit stage potential visitors to destinations with a negative image. Our suggested approach addresses this point.

Toward an Ambidextrous Management of T.O and T.A

Ambidexterity is a concept developed by Dr. Robert Duncan in 1976. This concept calls for a balance between exploration and exploitation. Indeed, organisations deeply anchored onto exploration suffer the costs of experimentation (R&D) with, sometimes, limited benefits. Organisations anchored onto exploitation, on the other hand, do not move forward and remain in a 'status-quo' in terms of performance. Organisations who manage to find a balance between exploitation and exploration are likely to be prosperous (Nieto-Rodriguez, 2014). The same can be said about mastering a balance between adaptability (in other words the ability of the organisation to innovate to adapt changes in the market) and alignment (daily management of operations). This approach is about balancing exploitation of existing resources and competencies with a focus on the present, and exploring new opportunities, with a focus on the future (Mihalache & Mihalache, 2016). Despite the challenges of achieving ambidexterity because exploitation and exploration innovation are contradictory activities, Mihalache and Mihalache (2016, p. 144) explain that 'organisational ambidexterity is a key driver of sustained performance in the tourism industry, since it enables firms to make the most of their current capabilities while at the same time developing new ones to attract new customers'.

Still, according to Nieto-Rodriguez (2014), organisational ambidexterity requires many changes: leadership and culture; people and skills; structure and governance; enterprise performance management; and systems and tools. For Visser (2015), changes will only happen after: unlocking change through transformational leadership; changes through enterprise; technology innovation; corporate transparency; stakeholder engagement; social responsibility integrated value; and change through integrated value. In this research we focused on systems and tools; future fitness; and stakeholder engagement.

In tourism research, ambidexterity is rather new and therefore scarcely used by scholars. There are two streams of research in tourism regarding ambidextrous management. A first stream of research names and defines the concept, whereas a second stream of research applies the concept without referring to its name. Among those who actually name ambidexterity are, for instance, Broker and Joppe (2014) who used the concept to conceptualise the different type of innovators in the tourism industry (i.e. painters, artisans and artists). Using the example of hurricane Irma's impact on the tourism industry of the Caribbean, Seraphin (2018) explained that an ambidextrous management of the industry could lead to a sustainable reconstruction of the Caribbean. He indeed explained that an ambidextrous approach would consist in using the hurricane season to develop a new tourism product like hurricane and thunderstorms chasing. This approach would also consist in developing resorts under domes to counter the threat of adverse weather that affects hotel plants, tourist attractions and demands. Other scholars do not always refer to the term although they apply an ambidextrous management approach. For instance, Seraphin, Ambaye, Gowreesunkar and Bonnardel (2016) explain that a good logo for a tourism destination should simultaneously maintain the essence of the destination whilst contributing to change the image of the destination, but at no point refer to the term 'ambidexterity.' The same could be said about Sanchez and Adams (2008) who refer to tourism as a Janus-faced industry (the positive impacts of the industry also come with negative impacts) instead of referring to the ambidextrous nature of the industry. It would seem that the tourism industry is ambidextrous by nature. The concept of ambidexterity has always been present in the industry but never referred as such. Finally, this strategic management approach would seem as a natural and relevant approach for the industry, a systematic way of managing a destination or an organisation (private or public tourism organisations) at macro and micro levels of the business environment.

As a model or concept, KidZania is to some extent ambidextrous. It exploits existing activities of organisations (partners) and also turn those activities into a learning tool, the final outcome being an edutainment and advertainment tool. By adopting the KidZania model, TOs and TAs would as a result adopt an ambidextrous management approach. Their daily activity would be the exploitation aspect of Ambidexterity and turning them into a learning tool, the exploration aspect. The long-term results would be brand loyalty. Equally important, partnering with KidZania would give TOs and TAs an opportunity to shape the interests and desires of future customers. Instead of having to adapt to trends, TOs and TAs have the opportunity to be the one shaping the trends. Instead of reacting, they would be an influencing position.

DISCUSSION AND CONCLUSION

Overall this chapter was about innovation in the tourism industry. For Krizaj, Brodnik and Bukovec (2014) and Brooker and Joppe (2014), innovation is all about introducing new concepts, products, services, process, marketing technique, organisational structure to meet the needs of existing and new customers with the overall purpose to stimulate and increase spending and growth. Innovation also relates to the capacity of an organisation or destination to cope and adapt to changes. Exploratory innovation is associated with new knowledge, and a potential for long term growth, and exploitative innovation / growth in turn focuses on the refinement of knowledge, production, execution and implementation (Camison, & Villar-Lopez, 2012). Brooker and Joppe (2014), categorise innovation in a slightly different way. First, incremental innovation is most of the time in reaction to a situation and is implemented with a short-term vision, and managers need to be customer centred. Second, radical innovation is proactive and subsequently disrupts current conventions. Radical innovators may be outsiders able to read the Zeitgeist and think creatively. They will be new customer centred. Krizaj et al. (2014), claim that the tourism industry has often lacked an innovative, radical approach, and instead have tended to rely upon incremental innovation. Brooker and Joppe (2014) further acknowledge barriers to innovation relating to: capital; skills; training; knowledge; technical support, and; the ability to implement strategy. Pre-requisites for the success of innovation include an inclusive strategy and offering value to its multiple stakeholders. Innovation is associated with ambidextrous management (Seraphin, Smith, Scott & Stoakes, 2018; Seraphin, 2018). Effectively the category incremental innovation aligns closely with the exploitative side of ambidexterity, and radical innovation aligns with exploration. Applying the KidZania model to the tourism industry would be a radical innovation. The KidZania model based on visitors' experience is not the only one based on this model. In the agri-food sector, we can mention Eataly. The intention of the chain 'is not only to sell quality food but also to offer unique, rich customer experience' (Di Pietro et al., 2018, p. 153).

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KEY TERMS AND DEFINITIONS

Innovation: Innovation is all about introducing new concepts, products, services, process, marketing technique, organizational structure to meet the needs of existing and new customers with the overall purpose to stimulate and increase spending and growth.

KidZania: KidZania is an experience design concept targeted at young people. The KidZania model could be said to be a form of manipulation of emotions, by pushing the children to behave and consume the way we would like them to.

Travel Agents (TAs) and Tour Operators (TOs): Travel agents (TAs) and tour operators (TOs) are retailers and as such they sell a variety of products and services, among these are: tours; overseas package tours; short break holidays; flights; theatre booking; car hire; cruising holidays; rail tickets; coach holidays and tickets; travel insurance; foreign exchange. This is in addition to bureaucratic services: visa and passport applications; making reservation; planning itineraries; calculating fares and charges; advising clients; and dealing with customer complaints.

Chapter 5
Idiosyncratic Deals and Organizational Performance:
A Study of the Indian Travel Intermediaries Industry

Mohinder Chand Dhiman
Kurukshetra University, India

Anastasia A. Katou
University of Macedonia, Greece

ABSTRACT

The purpose of this study is to examine the mediating mechanism of idiosyncratic deals (i-deals) content (e.g., task, career, flexibility) in the relationship between core self-evaluations - CSE (e.g., efficacy, esteem, stability, locus of control), employee outcomes (e.g., motivation, commitment, work engagement and organizational citizenship behavior), and the mediating mechanism of employee outcomes in the relationship between i-deals and organizational performance (e.g., productivity, growth, creativity). The hypotheses of the study were tested with the application of structural equation modelling on data collected from 141 employees working in 17 companies operating in the Indian travel intermediaries industry. The findings show that i-deals content positively and partially mediate the relationship between CSE and employee outcomes, and employee outcomes positively and fully mediate the relationship between i-deals content and organizational performance. Implications of the findings for both research and practice are discussed.

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INTRODUCTION

Factors such as the lowering of travel barriers, the falling costs and the growth of disposable income put travel and tourism (T&T) within reach of millions. More people than ever before are travelling today, with 1.24 billion international arrivals in 2016, compared to 25 million in the 1950s. In this dynamic environment emerging markets started being very attractive destinations. It is forecasted that between 2016 and 2026, the top 10 fastest growing destinations for leisure travel spending are expected to be in India, followed by Angola, Uganda, Brunei, Thailand, China, Myanmar, Oman, Mozambique and Vietnam (WEF, 2017).

In particular, India is one of the most improved nations in T&T, gaining 12 places to reach the 40^{th} position globally. Although the T&T sector benefited from improvements in the country's ground transport infrastructure, the improvement of ICT readiness (112^{th} position) and human resources (87^{th} position) remain still weak (WEF, 2017). Further, research supports (see Katou and Katsouli, 2019), that ICT readiness is the most important factor among the resources driven-factors and human resources are the most important factor among the environmental-driven factors, which contribute to the T&T competitiveness.

However, the internet and in general ICT readiness has become an enormous mechanism that enables locals and travelers to connect directly without relying on intermediaries (WEF, 2017). Intermediary is a person or an organization in the travel distribution chain operating between providers of travel services and the public (Beaver, 2005). Hence, intermediaries face challenges which may be addressed by changing their business models accordingly.

Taking into consideration all the above, intermediaries may address the challenges by attracting and retaining the right people with the right skills which are available in order to meet the demand for additional human capital. This may be done by offering idiosyncratic deals before and during employment. "I-deals refer to voluntary, personalized agreements of a nonstandard nature negotiated between individual employees and their employers regarding terms that benefit each party" (Rousseau, 2005, p. 8). In particular, the major characteristics of i-deals are as follows (Rousseau, Ho, & Greenberg, 2006): (a) I-deals are individually negotiated between the employer and an employee. (b) I-deals are heterogeneous in the sense that they include features that differ from what workers in similar roles receive. (c) I-deals benefit both employer and employee. (d) I-deals are varied in scope from a single element of a general employment package to a completely idiosyncratic employment agreement.

I-deals do not work in a vacuum. This is because the employers usually grant i-deals to employees not only after they have proved to be trustworthy and valuable, but also to recruits considering their qualities in the labour market (Rousseau, 2005). Accordingly, personal attributes such as core self-evaluation of individuals play an important role in negotiating i-deals and in achieving i-deals with specific content (Chand, Budhwar, & Katou, 2017). Therefore, based on self-enhancement theory (Sedikides & Strube, 1995), in this study we treat core-self evaluations of individuals to be antecedents of i-deals content.

It is argued that employees will systematically react positively when they are offered i-deals that meet their expectations (Loughlin & Murray, 2013; Ng & Feldman, 2010; Rousseau, 2005; Sturges, 2012). However, these employee reactions may depend on the content of i-deals producing accordingly differential employee outcomes (Hornung, Rousseau, & Glaser, 2008). Therefore, based on social exchange theory (Blau, 1964), in this study we assume that employee outcomes are influenced by i-deals content.

Additionally, it is argued that the recipients of i-deals, feeling obligated towards the organisation, are likely to reciprocate by positively reacting toward their organisation and thus contributing to the improvement of organisational performance (Anand, Vidyarthi, Liden, & Rousseau, 2010). Therefore, based also on social exchange theory, in this study we assume that organisational performance improvements depend on efficient employee outcomes produced by i-deals arrangements (Hornung et al., 2008).

Summarizing, the present study seeks to investigate the employment relationship concerning i-deals in the Indian travel intermediaries industry which is largely untested. On the whole, the main aims of this research are then three-fold. First, is to examine whether core self-evaluations influence i-deals content. Second, is to examine whether i-deals content influences employee outcomes. Third, is to examine whether employee outcomes based on i-deals influence organizational performance. In other words, the present study seeks to investigate whether i-deals content and employee outcomes serially mediate the relationship between core self-evaluations of employees and organizational performance.

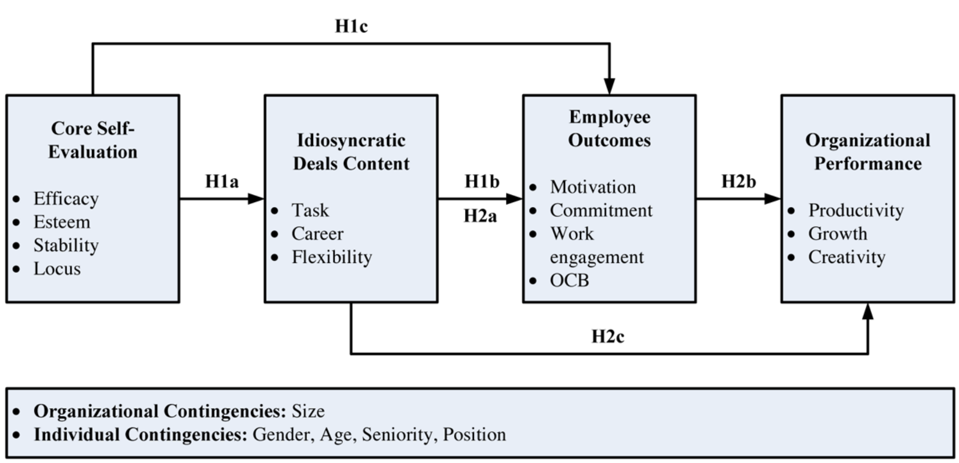
RESEARCH FRAMEWORK AND HYPOTHESES

Figure 1 presents the operational framework utilised for this research. There are two distinguishing features of this framework. The first feature investigates the mediating mechanism of i-deals content in the relationship between core self-evaluations and employee outcomes. The second feature refers to the mediating mechanism of employee outcomes in the relationship between i-deals content and organizational performance. The logic for the choice of the research framework adopted for this study is presented below.

1st Mediating Mechanism

I-deals can take many forms depending on whether they have been granted before hiring or during employment (Rousseau, Hornung, & Kim, 2009). The content of i-deals is usually distinguished into three dimensions – task, career and flexibility. Task i-deals are personalised arrangements where individual employees negotiate to make their job content more motivating and enjoyable. Career i-deals are cus-

Figure 1. Operational model of the I-Deals–Organizational Performance relationship



tomised arrangements in which individual employees negotiate for advancing their professional careers. Flexibility i-deals are personalised arrangements where individual employee's negotiate with respect to their working hours and work scheduling to better fit their needs and preferences (Hornung, Rousseau, Weigl, Muller, & Glaser, 2014).

There are many worker specific factors contributing to i-deals, such as their skills, competencies and capabilities (Rousseau, 2001). However, less is known about the influence of core self-evaluations (CSE) in the employment relationship concerning i-deals (Ng & Feldman, 2010). Core self-evaluations include the fundamental qualities people hold about themselves (Judge, Locke, Durham, & Kluger, 1998). There are usually four dimensions of CSE: self-efficacy, self-esteem, emotional stability and locus of control. Self-efficacy is the extent to which individuals believe in their ability to perform tasks and reach goals. Self-esteem is the extent to which individuals evaluate their own worth. Emotional stability is the extent to which individuals feel mentally healthy. Locus of control is the extent to which individuals believe that they can control events that affect them (for details see Judge, Locke, & Durham, 1997; Judge et al., 1998).

Less is known about the influencing effect of CSE in the employment relationship concerning i-deals (Ng & Feldman, 2010). Taking into consideration that reactions to events are influenced by how worthy one views oneself (Chang, Ferris, Johnson, Rosen, & Tan, 2012), it is proposed in this study that CSE positively influences i-deals content. Individuals, who have high positive assessment about their own worth, reflected in their high CSE, negotiate persistently and achieve i-deals, believing that the employer acknowledges their worth.

Employees obtaining i-deals may feel obligated to the organisation and thus, they are likely to reciprocate by positively reacting toward their organisation (Anand et al., 2010; Ng & Feldman, 2012). Important employee reactions within an organisation are usually categorised into four types - motivation, commitment, work engagement or satisfaction and organisational citizenship behaviour (OCB). Employee motivation is defined as "a set of energetic forces that originates both within as well as beyond an individual's being, to initiate work-related behaviour, and to determine its form, direction, intensity, and duration" (Pinder, 1998, p. 11). Employee commitment describes the extent of an employee's identification with and attachment to an organization (Meyer & Allen, 1991). Employee work engagement or satisfaction is often defined as "a positive, fulfilling, work-related state of mind that is characterized by vigour, dedication, and absorption" (Schaufeli, Salanova, Gonzalez-Roma, & Bakker, 2002: 74). Organizational citizenship behaviour refers to work-related behaviour that goes above and beyond that is dictated by organizational policy and one's job description (Organ, 1988).

Summarizing, we hypothesize that:

Hypothesis 1: I-deals content (fully or partially) mediates the relationship between core self-evaluations and employee outcomes.

This hypothesis is decomposed into the following three sub-hypotheses:

Sub-Hypothesis 1a: Core self-evaluations positively and directly influence i-deals content.
Sub-Hypothesis 1b: I-deals content positively and directly influences employee outcomes.
Sub-Hypothesis 1c: Core self-evaluations positively and directly influence employee outcomes.

2nd Mediating Mechanism

We said previously that it is argued that the recipients of i-deals, feeling obligated towards the organisation, are likely to reciprocate by positively reacting toward their organisation and thus contributing to the improvement of organisational performance (Anand et al., 2010). Thus, it is assumed that organisational performance improvements depend on i-deals arrangements by making employees to efficiently engage in organisational activities with respect to productivity, growth and creativity (Hornung et al., 2008). This is also supported by research findings that employee reactions are related with organisational performance (e.g., Boselie, Dietz, & Boon, 2005; Jiang, Lepak, Hu, & Baer, 2012). Summarising the literature analysed thus far, the i-deals – organisational performance relationship is largely based on the assumption that employees' perceptions of i-deals have an effect on organisational performance through employee outcomes. This leads to the following hypothesis:

Hypothesis 2: Employee outcomes (fully or partially) mediate the relationship between i-deals content and organizational performance.

This hypothesis is decomposed into the following three sub-hypotheses:

Sub-Hypothesis 2a: I-deals content positively and directly influences employee outcomes.
Sub-Hypothesis 2b: Employee outcomes positively and directly influence organizational performance.
Sub-Hypothesis 2c: I-deals content positively and directly influences organizational performance.

We note here that sub-hypothesis H2a is the same with sub-hypothesis H1b indicating the serially connecting nature of the two mediating mechanisms.

METHOD

Sample

The current research is based on a general study referring to the Indian hospitality industry (for details see Chand et al., 2017). A questionnaire survey in the Indian travel intermediaries industry was carried out between December 2013 and March 2014. Of the sample of 17 private organisations, 58.8 percent had 75 to 250 employees, 23.5 percent had 251 to 500 employees, and 17.6 percent had more than 500 employees. Of the sample of 141 respondents, 79.4 percent were male and 20.6 percent were female. The average age of respondents was 27.84 (± 3.87) years old, and the average seniority (i.e., years employed in the organisation) was 4.81 (± 2.98) years. Finally, 14.2 percent of the respondents were senior managers, 34.0 percent were middle managers, and 51.8 percent belongs to the other category of employees.

Measures

Unless indicated, all research constructs are measured using a five-point rating scale ranging from 1 = not al all to 5 = to a very great extent, from 1 = totally disagree to 5 = totally agree, or from 1 = very little to 5 = very much (Chand et al., 2017).

Core Self-Evaluations

The scale of core self-evaluations comprised of 12-items developed by Judge, Erez, Bono, & Thoresen (2003), which contains four subscales of self-efficacy ($\alpha = 0.560$), self-esteem ($\alpha = 0.641$), emotional stability ($\alpha = 0.649$), and locus of control ($\alpha = 0.595$). Example items include: "I complete tasks successfully," "Overall, I am satisfied with myself," "There are no times when things look pretty bleak and hopeless to me," and "Always, I feel in control of my work".

I-Deals Content

The i-deals content comprised of 9-items developed by Hornung et al. (2014) and categorised into three groups - work tasks ($\alpha = 0.872$), career support ($\alpha = 0.804$), and flexibility schedules ($\alpha = 0.859$). Respondents were asked to rate the extent to which they had asked for and successfully negotiated personalised conditions in their current job. Specifically, example items include:

- **Tasks I-Deals:** "Job tasks that fit my personal strengths and talents," and "Job tasks that fit my personal interests".
- **Career I-Deals:** "Career options that suit my personal goals," and "Personal career development opportunities".
- **Flexibility I-Deals:** "A work schedule suited to me personally," and "A work schedule customized to my personal needs".

Employee Outcomes

The construct of employee outcomes comprised of four dimensions of motivation, organisational commitment, work engagement, and organisational citizenship behaviour. Specifically:

- **Motivation:** This scale comprised of 11-items developed by Lockwood (2010), comprising of three sub-scales – recognition ($\alpha = 0.810$), incentives ($\alpha = 0.890$), and relations ($\alpha = 0.811$). Example items include: "I feel motivated when the organization personally congratulates me for my excellent work," "I feel motivated when the organization is using performance as the basis for promotion," and "I feel motivated when the organization is fostering a sense of community".
- **Commitment:** This scale comprised of 15-items developed by Allen and Meyer (1990), which is divided into three sub-scales of affective commitment ($\alpha = 0.911$), continuance commitment ($\alpha = 0.898$), and normative commitment ($\alpha = 0.851$). Example items include: "I feel proud to tell people who I work for," "It would be very hard for me to leave my organization right now, even if I wanted to," and "If I got another offer for a better job elsewhere I would not feel it was right to leave my organization".
- **Work Engagement:** This scale comprised of 17-items developed by Allen and Meyer (1990), which consists of three sub-scales of vigour ($\alpha = 0.830$), dedication ($\alpha = 0.830$), and absorption ($\alpha = 0.914$). Example items include: "When I get in the morning, I feel like going to work," "To me my job is challenging," and "When I am working, I forget everything else around me".

- **Organisational Citizenship Behaviour (OCB):** This scale comprised of 20-items developed by Niehoff and Moorman (1993) and contains five sub-scales of altruism (α = 0.748), courtesy (α = 0.596), sportsmanship (α = 0.851), conscientiousness (α = 0.827), and civic virtue (α = 0.847). Example items included: "I am helping others who have heavy workloads," "I am consulting with other individuals who might be affected by my actions or decisions," "I am not consuming a lot of time complaining about trivial matters," "I am always punctual," and "I keep abreast of changes in the organization."

Organizational Performance

The organizational performance construct comprised of 6-items developed by Delaney and Huselid (1996) and categorised into three groups – productivity (α = 0.723), growth (α = 0.779), and creativity (α = 0.805). Respondents were asked to rate the overall organizational performance. Specifically, the items included are:

- **Productivity:** Effectiveness (if the organisation meets its objectives) and Efficiency (if the organisation uses the fewest possible resources to meet its objectives).
- **Growth:** Development (if the organisation is developing in its capacity to meet future opportunities and challenges) and Satisfaction ((of all participants; stakeholders, employees, customers).
- **Creativity:** Innovation (for products and processes) and Quality (% of products of high quality).

Controls

We included size (small: up to 250 employees, medium: 251-500 employees, large: more than 500 employees) as *organizational control* variables and gender (male, female), age (up to 25 years, 26-30 years, more than 30 years), seniority (up to 5 years, 6-10 years, more than 10 years) and position (senior manager, middle manager / line manager, other employee) as *individual control variables*. These demographic variables are known to have relationship between i-deals and employee reactions (e.g. Ng & Feldman, 2008, 2010). Each of the controls was treated in estimation as a single latent variable.

THE SURVEY INSTRUMENT

We have indicated previously all the references used in measuring the specific items of the questionnaire that constitute the constructs of the study. Taking into consideration that all of these items are developed in the literature and are well accepted and validated we believe that content validity is highly acceptable (Straub, 1989).

The constructs used in this study are second order constructs constituted by a number of first level sub-constructs as presented above. Properties of the second order constructs are presented in Table 1. According to the computed Cronbach (1951) alphas presented in Table 1 the survey instrument is reliable for testing the model presented in Figure 1, as all Cronbach alphas are much higher than 0.70 (Nunnally, 1978). Similarly, all Cronbach alphas (except those referring to the core self-evaluations first level construct) are greater than 0.70 as we can see in the measures section.

The percentage of total variance explained values reported in Table 1, which have been derived by applying confirmatory factor analysis (CFA) with Varimax rotation and the eigenvalue greater than one criterion we examined, are greater than 50 percent indicating acceptable survey instrument construct validity (Hair, Anderson, Tatham, & Black, 2008).

The composite reliability figures presented in Table 1 are all greater than 0.70 indicating that the degree of the construct composite reliability is acceptable (Fornell & Larcker, 1981; Hair et al., 2008).

For testing construct discriminant validity we examined the average variance extracted (AVE) and the correlation coefficients reported in Table 1. Because it is seen that the correlation coefficients are significantly different from unity (Gefen, Straub, & Boudreau, 2000), and they are smaller than the square root of each factor's AVE (Gefen & Straub, 2005), we concluded that the constructs used in the study are separate.

Since all our data were collected from participants at the same point in time, and through a single instrument, our study potentially suffers from common method bias. In order to address this issue, we drew on the recommendations of Podsakoff, MacKenzie, Lee, and Podsakoff, (2003) and Lindell and Whiney (2001) by putting every effort to ensure that the participants were convinced of the anonymity of their responses, by asking multiple respondents from each organization to answer the questions of the questionnaire, and by making very clear that all data would be combined for analytical purposes and that individual responses would never be analyzed or discussed. Additionally, we used Harman's (1967) single factor test to examine the likelihood of common method bias threat. According to this test the fit indices (Chi-Square = 636.394, df = 77, p = 0.000, Normed-Chi-Square = 8.265, RMSEA = 0.221, NFI = 0.575, CFI = 0.602, GFI = 0.623, TLI = 0.530, RMR = 0.032) indicate that common method bias is negligible.

Statistical Analysis

To test the hypotheses developed of the proposed framework the methodology of 'structural equation models' (SEM) was used, via AMOS. SEM is effective when testing models that are path analytic with mediating variables, and include latent constructs that are being measured with multiple items. We assessed the overall model fit following Bollen's (1989) recommendation to examine multiple indices, since it is possible for a model to be adequate on one fit index but inadequate on many others. Specifically, we used the chi-square test, normed-chi-square ratio, the goodness of fit index (GFI), the normed fit index (NFI), the comparative fit index (CFI), the Tucker-Lewis fit index (TLI), the root mean squared error of approximation (RMSEA), and the root mean squared residual (RMR).

RESULTS

The Measurement Model

Before testing the hypotheses, a series of CFAs were performed to ensure construct validity. First, the hypothesized model was tested, referring to the four constructs. Analyses showed acceptable fit for the hypothesized structure (Chi-Square = 130.800, df = 61, p = 0.000, Normed-Chi-Square = 2.144, RMSEA = 0.090, NFI = 0.908, CFI = 0.948, GFI = 0.893, TLI = 0.922, RMR = 0.017). We compared the fit of the proposed measurement model to an alternative, less restrictive, model with all items loading on a

Table 1. Means, standard deviations, consistency indices, and correlation coefficients of the constructs used in the study

Constructs	Means (Standard deviations)	Consistency indices				Correlation coefficients			
		Cronbach Alpha	Percent of total variance explained	Average variance extracted	Construct reliability	Core Self-Evaluation	Idiosyncratic Deals	Employee Outcomes	Organizational Performance
Core Self-Evaluation	4.605 (0.405)	0.736	56.753	0.420	0.715	1			
Idiosyncratic Deals	4.783 (0.433)	0.903	85.005	0.897	0.963	0.340**	1		
Employee Outcomes	4.788 (0.317)	0.890	76.503	0.715	0.908	0.425**	0.673**	1	
Organizational Performance	4.837 (0.398)	0.812	74.911	0.450	0.704	0.083	0.313**	0.402**	1

* $p < 0.05$; ** $p < 0.01$

single factor. This model was found to fit worse than the hypothesized model (see results with respect to the common method bias presented previously). We further compared the proposed measurement model with alternative models with restrictions ranging between the proposed four-factor model and the single factor model. The fit values of these alternative models were ranging between the two extreme models, supporting the proposed factor structure of the constructs used in this study as well as their discriminant validity (Anand et al., 2010).

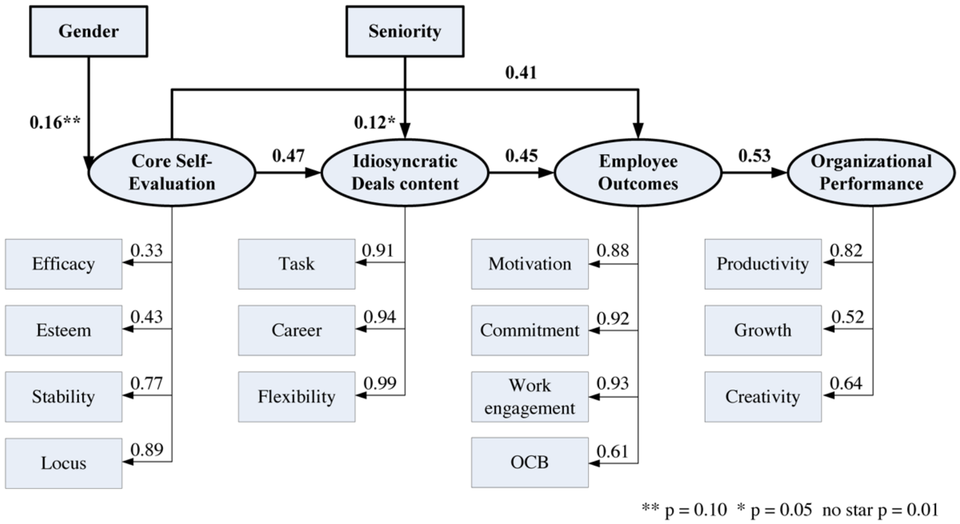
Structural Model

In Table 1 we observe strong, positive and significant correlations between all structural constructs, supporting the hypotheses of the study. However, results based on correlations, although interesting, may be misleading due to the interactions between several variables (Chand et al., 2017). Therefore, in order to isolate the possible links between the variables involved in the operational model presented in Figure 1, the estimated path diagram for this proposed framework is presented in Figure 2. The circles represent the related latent variables and the bold arrows indicate the structural relationships between the corresponding variables. The numbers that are assigned to each arrow show the estimated standardized coefficients, and the goodness-of-fit indexes are as follows: Chi-Square = 152.403, df = 90, p = 0.000, Normed-Chi-Square = 1.693, RMSEA = 0.070, NFI = 0.895, CFI = 0.953, GFI = 0.891, TLI = 0.938, RMR = 0.017. It must be noted here that although the chi-square statistics are significant, taking into consideration that all the reported standardized coefficients are significant, and all the rest goodness-of-fit indexes are highly acceptable, we accept that the validity of the model is satisfactory.

Testing the Hypotheses

According to the estimation results presented in Figure 2, it is seen that the estimated standardized coefficient (0.47) of the direct link between CSE and i-deals is positive, thus supporting sub-hypothesis $H1_a$; the estimated standardized coefficient (0.45) of the direct link between i-deals content and employee outcomes is positive, thus supporting sub-hypothesis $H1_b$; and the estimated standardized coefficient

Figure 2. Estimation results of the i-deals – organizational performance relationship



(0.41) of the direct link between CSE and employee outcomes is positive, thus supporting sub-hypothesis $H1_c$. Taking into consideration these results we conclude that the i-deals content partially mediates the relationship between CSE and employee outcomes, thus supporting hypothesis H1.

Similarly, according to the estimation results presented in Figure 2, it is seen that the estimated standardized coefficient (0.45) of the direct link between i-deals content and employee outcomes is positive, thus supporting sub-hypothesis $H2_a$ (same with $H1_b$); the estimated standardized coefficient (0.53) of the direct link between employee outcomes and organizational performance is positive, thus supporting sub-hypothesis $H2_b$; and the estimated standardized coefficient of the direct link between i-deals content and organizational performance is not significant (not shown in Figure 2), thus rejecting sub-hypothesis $H2_c$. Taking into consideration these results we conclude that employee outcomes fully mediate the relationship between i-deals content and organizational performance, thus supporting hypothesis H2.

Examining the standardized loadings of the dimensions that constitute each construct in Figure 2, we see that locus of control (i.e., the extent to which individuals believe that they can control events that affect them) and emotional stability (i.e., the extent to which individuals feel mentally healthy) are the two most important dimensions that determine core self-evaluations and predict i-deals content. Flexibility i-deals (i.e., the personalised arrangements that better fit to the needs and preferences of individuals) and career i-deals (i.e., the customised arrangements for advancing the professional careers of individuals) are the two most important dimensions that determine i-deals content and predict employee outcomes. Employee work engagement (i.e., the state of mind that characterizes satisfaction of individuals) and employee commitment (i.e., the extent of an employee's identification with and attachment to an organization) are the two most important dimensions that determine employee outcomes and predict organizational performance with the highest emphasis of productivity (i.e., efficiency and effectiveness).

Finally, in terms of the controls used in estimation, we see in Figure 2 that only gender and seniority produced significant results. In particular, the positive coefficient of gender indicates that core self-evaluations are higher in women compared to men. Further, the positive coefficient of seniority (i.e., years working in organization) indicate that employee outcomes are at higher levels for individuals working more years in the organization compared to the individuals working less years in the organization.

DISCUSSION

Implications for Theory

This research examined whether the relationship between i-deals content (i.e., task, career, and flexibility), which is influenced by CSE (i.e., efficacy, esteem, stability, and locus of control), has an impact on organizational performance (i.e., productivity, growth, and creativity) through employee outcomes (i.e., motivation, commitment, engagement, and OCB). The results of this examination found to be largely in accordance with i-deals theory on the nature of the employment relationship (Chand et al., 2017; Rousseau et al., 2006).

Based on self-enhancement theory, the analysis confirmed that i-deals content is influenced by CSE, and especially by the extent to which individuals believe that they can control events that affect them and the extent to which individuals feel mentally healthy. This finding means that individuals who have these two qualities are able to successfully negotiate i-deals referring to arrangements that better fit to their needs and preferences, and at the same time are able to negotiate professional careers in the organization.

Based on the social exchange theory, the analysis confirmed that employee outcomes, and especially employee work engagement and commitment, mediate the relationship between i-deals content and organizational performance. This finding means that the offering of i-deals to individuals that meet their expectations (Ng & Feldman, 2010; Rousseau, 2005), will make them more efficient and effective.

LIMITATIONS

This study has three main limitations that might be addressed in future empirical research. First, the data were collected using a questionnaire at a single point in time. As a result, the study does not allow for appropriately investigating dynamic causal inferences (Cavanaugh and Noe, 1999). Second, i-deals content was reported in retrospect, raising measurement concerns about recall bias (Lippman & Mackenzie, 1985). Third, considering that the data used refer to the Indian travel intermediaries industry, our findings may not generalise across different industries, occupations, and borders.

Implications for Research

This study has focused on identifying the impact of i-deals content on organizational performance through employee outcomes. The findings of this study support the view that the granting of i-deals to their employees makes them more productive and effective, with the ultimate result of improving the productivity of the company. However, these findings are half the story. This is why the present work looked at the positive results from the granting of i-deals to workers without taking into account the possible negative effects of not giving i-deals to other working colleagues of the former. In other words, a complete approach would be a comparison between the positive and the negative effects on organizational performance of i-deals (Ng & Feldman, 2009).

Implications for Practice

We said in the introduction of this study that ICT readiness and human resources are the two most important factors that may enhance T&T competitiveness. We also said that these two factors if properly used by travel intermediaries may improve their competitiveness. Thus, the business model that travel intermediaries may consider must be based on these two factors:

1. **Human Resources:** I-deals should be considered by travel intermediaries to belong among those organisational practices which are aiming to attract, retain, engage and motivate employees. The granting of i-deals to employees will make their work engagement more productive, their jobs more motivated, and themselves more committed to the organisation (Hornung et al., 2014). As a result, sustained competitive advantages may be achieved by the intermediaries' responding to the changing needs of its personnel by engaging in on-going i-deals (Inkson & King, 2011). However, travel intermediaries should consider that i-deals are costly for organisations, especially if they do not improve the employment relationships, and thus the rare and valuable resources given to employees in these i-deals may be wasted (Ng & Feldman, 2010).
2. **ICT:** Our findings showed that creativity is the second organizational performance dimension that is affected by i-deals. We said previously that creativity incorporates innovation for products and processes. This means that travel intermediaries should consider the rise of e-travel, the rapidity of innovations, and the wider use of the internet. In other words, intermediaries by offering i-deals to employees should investigate the possible interactions between their human resources and ICT for exploiting the on-line travel revolution.

CONCLUSION

The findings of this study confirm that i-deals have a positive impact on organizational performance in the Indian travel intermediaries industry. In general, the study supports the view that the personality of individuals, expressed by core self-evaluations, influences the content of i-deals, and that the content of i-deals has a positive impact on organizational performance, through a positive but different effect on employee outcomes. In particular, locus of control and emotional stability are tied more with work flexibility, career opportunities and task arrangement than self-efficacy and self-esteem. Additionally, work flexibility has the highest impact on employee engagement and commitment compared to employee motivation and commitment. Further, employee engagement and commitment have the highest impact on organizational productivity compared to organizational growth and creativity. Finally, although the data used refer to the Indian travel intermediaries industry, the model connecting i-deals with organizational performance worked rather well, indicating that idiosyncratic deals are not limited to workers in developed countries.

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KEY TERMS AND DEFINITIONS

Career I-Deals: Refer to customized arrangements that individual employees negotiate in order to secure promotional opportunities and professional careers.

Core Self-Evaluations: Include the fundamental qualities people hold about themselves.

Employee Commitment: It describes the extent of an employee's identification with and attachment to an organization.

Employee Motivation: It is defined as a set of energetic forces that originates both within as well as beyond an individual's being, to initiate work-related behavior, and to determine its form, direction, intensity, and duration.

Employee Work Engagement: It is defined as a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption.

Flexibility I-Deals: Refer to personalized arrangements that individual employees negotiate in order to achieve work hours and scheduling that better fit their needs and preferences.

Idiosyncratic Deals (I-Deals): I-deals refer to voluntary, personalized agreements of a nonstandard nature negotiated between individual employees and their employers regarding terms that benefit each party.

Intermediary: Is a person or an organization in the travel distribution chain operating between providers of travel services and the public.

Organizational Citizenship Behavior (OCB): It refers to work-related behavior that goes above and beyond that is dictated by organizational policy and one's job description.

Self-Enhancement Theory: It refers to the motivation that makes people to feel good about themselves.

Social Exchange Theory: It refers to the process of negotiated exchanges between parties.

Task I-Deals: Refer to personalized arrangements that individual employees negotiate in order to make their job content more motivating, rewarding, and enjoyable.

Chapter 6
Role, Rules, and Regulations for Global Medical Tourism Facilitators

Anita Medhekar
Central Queensland University, Australia

ABSTRACT

Global medical travel has transformed medical travel/tourism facilitator's role, making it more sophisticated and globally competitive with their presence on the internet, and providing medical tourism packages catering to patient-centered healthcare needs. The important role played by medical tourism facilitators cannot be ignored along with rules and regulations required to accredit these medical travel companies. They act as mediators between the potential patients and the private healthcare providers, physicians in the global medical tourism supply chain, along with airlines and hotel, thus, reducing a medical traveler's worries regarding surgery abroad. Facilitators assist the potential medical tourists to plan and make healthcare decisions for travelling abroad, choosing and matching the patient with the specialty hospital for surgery, country and making all travel, accommodation and visa arrangements prior to travel, coordination between doctor and patient, personal nursing attendant, follow-up care and possibility of sightseeing, rest and recovery at the host-country of treatment. Thus, the chapter examines the reasons for the growth of global healthcare through medical travel/tourism in developing countries such as India, Thailand, Mexico, Poland and Malaysia and identifies the role, rules and regulations required for accredited medical tourism facilitators to connect patients with the healthcare providers in various countries to meet specific healthcare needs.

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BACKGROUND INTRODUCTION

Tourism is linked with travelling for leisure, pleasure, sightseeing, shopping and relaxation. On the other hand, travelling for medical purposes or medical tourism (MTm) is linked with illness, overseas hospital, diagnostic tests, complex surgery such as cancer, cardiac, cosmetic, organ transplant, knee/ hip replacement, eye, dental or reproductive purposes. 'Patients without borders,' similar to 'doctors, without borders' is a reality. Patients' as medical tourists (MTs) travel to seek affordable but better or comparable quality of healthcare in desperate and helpless situation, with a hope to cure and improve their health and quality of life. Increasingly, patients are travelling crossborder or across continents for wellness/alternative therapy or medical treatment/surgery. Patients are using services of medical travel agents (MTAs) also popularly known as Medical Tourism Facilitators (MTFs) to make healthcare related travel arrangements. They can be: (i) well known private hospitals like Apollo, Bumrungrad, Wockhardt, Raffles and Fortis, who make travel arrangements for patients through their online travel-desk; (ii) Medical travel agencies also known as MTFs, arrange packaged medical travel specific to meet international patient's health and medical treatment requirements.

International medical travel has transformed the healthcare industry in an innovative way, similar to international education. Where patients as MTs have a choice of travelling to countries where the best quality of affordable surgery and medical expertise is available without any waiting time compared to their home country (Medhekar, Wong, & Hall, 2014). Increasing number of foreign patients from developed and developing countries are travelling to India, Thailand, Mexico, and Malaysia for affordable accredited quality of timely healthcare and positive healthcare outcomes (Lunt, Horsfall, & Hanefeld, 2016; Medhekar & Ali, 2012; Turner, 2007 & 2010).

These patients/MTs choose the hospital in a country for medical treatment. They either make their own travel arrangements directly, which is a complex decision-making process, by asking family and friends (word-of-mouth) who may have travelled abroad for treatment and search the internet (word of mouse) for information (Abubakar & Ilkan, 2016; Medhekar & Newby, 2012). Alternatively, increasing number of foreign patients from the demand-side are using the services of medical travel agents/ facilitators who act as liaison or broker to connect the potential MTs with the supply-side super-speciality hospitals and specialists surgeon/physicians on their list, to meet their healthcare needs (Dalstrom, 2013; Wagle, 2013; Skountridaki, 2017). They, MTFs play a key role in disseminating information to the potential MTs regarding various hospital facilities, super-speciality, surgical options, surgery cost, accreditation, countries economic and political situation, travel medicine, and tourism opportunities.

The important role played by MTFs cannot be ignored, as they act as mediators or intermediaries between the potential patients and the private corporate healthcare providers and physicians in the global MTm supply chain. Facilitators assist the potential MTs to plan and make healthcare decision for travelling abroad, choosing and matching the patient with the super-speciality-hospital for surgery and making all travel, accommodation and visa arrangements prior to travel, coordinate between doctor and patient, transfer confidential medical records, make arrangements for personal nursing attendant, hotel and follow-up care. Thus reducing MTs worries regarding surgery abroad (Crooks, Turner, Snyder, Johnston, & Kingsbury, 2011; Dalstrom, 2013; Mohamad, Omar, & Haron, 2012). Travelling abroad for medical surgery and treatment is very complex phenomenon given the logistics, compared to being a normal tourist. Global medical travel for surgery has transformed MTFs role, made it more sophisticated and globally competitive with their presence on the internet, and providing special MTm packages catering to patient-centric healthcare needs (Cheng, 2010; Turner, 2007; Lunt, Hardey, & Mannion, 2010).

There is extant of multidisciplinary literature related to medical tourism/travel information, health economics, healthcare marketing and communication, quality in global healthcare, patient-safety, social, ethical and equity issues. However, not much is known about MTF's rules, regulation and role in the global healthcare or medical travel sector. Given the information asymmetry, potential patients have to search for credible information regarding hospitals facilities and surgeons who can solve complex healthcare problems in a foreign country (Carrera & Lunt, 2010; Medhekar & Newby, 2012; Speier, 2011). It is a very time-consuming process for the potential patients, who are already going through health problems, and in desperate situation seeking possible options for overseas surgery due to long waiting time, being UN/underinsured, high surgery cost and treatment not available due to regulation in their home country.

This chapter aims to provide a platform to recognise the importance of accredited quality of MTFs and role played to connect patients with the accredited super-speciality hospitals and physicians, to get the positive healthcare outcome for the MTs/patient. The purpose of this chapter is to: (i) examine the reasons for the growth of global healthcare through medical travel/tourism in developing countries such as India, Thailand, Mexico, Poland and Malaysia; (ii) Identify and examine the role, rules and regulations required for accredited MTFs to connect patients with the healthcare providers in various countries to meet specific healthcare needs; (iii) Identify opportunities and challenges faced by potential MTs, MTFs, hospitals and tourism facilities treating foreign patients; (iv) Propose a partnership framework that could be adopted between patients, as MTs, MTFs and key supply-side stakeholders such as healthcare providers /hospitals and medical hotels with an objective to provide quality in medical and tourism services with positive healthcare outcomes and high level of patient/ MTs satisfaction.

This chapter is structured as follows. The first introductory section of the chapter provides background information regarding the growth of global medical tourism. Section 2 provides the literature review on MTFs and medical tourism. Section 3 provides information on methodology. Section 4 discusses the importance of rules and regulation required for global MTFs, where potential patients with critical health conditions such as cardiac, organ transplant, reproductive health, cancer, hip and knee replacements and cosmetic surgeries depend on the MTFs to make arrangements with accredited super-specialty hospital, physician, and manage patients' medical travel journey on behalf of the patient. Section 5 discusses the challenges faced by the patients, hospital and MTFs in global MTm sector. Section 6 presents recommendations and policy implications. Section 7 provides conclusion and future research directions to advance the knowledge in the field of the role of MTFs for planning MTm itinerary, connecting MTs with hospital, physician, hotel and arranging MTs journey abroad form airport pick-up, doctors appointment to hotel accommodation and sightseeing, and return journey.

LITERATURE REVIEW

Medical tourism is a collaboration between two sectors of the economy—medical and tourism to provide cost-effective healthcare (Bookman & Bookman, 2007; Medhekar et al., 2014). Wellness tourism (Ayurveda, Yoga, Unani, Siddhi and Herbal (AYUSH) and medical tourism are two niche segments of health tourism (Medhekar, 2012). Medical tourism has many micro-niche surgical-super-specialities such as cosmetic tourism, reproductive tourism, surrogacy tourism, stem cell, eye, and dental tourism.

It has grown exponentially due to privatisation of healthcare, globalisation, digitisation, commodification of healthcare, rise in per-capita-income, ease of international travel, and internet communication technologies (Bookman & Bookman, 2007; Crooks et al., 2011; Gezinski et al., 2017; Lunt et al., 2010; Medhekar & Newby, 2012; Sobo, Herlihy, & Bicker, 2011; Turner, 2010).

As travelling abroad for wellness and medical tourism continues to grow, more and more private super-speciality hospitals and MTFs websites as a platform will continue to emerge to connect patients with accredited private healthcare providers across the globe. Therefore, growth in the global travel for healthcare or MTm sector demands the creation of new business partnerships to achieve high levels of competitiveness for the stakeholders of the MTm sector providing services to foreign patients in the medical tourism supply chain. It is important to identify MTm management strategies and MTm supply-chain models that are necessary for the key stakeholders, private healthcare providers and MTFs to be competitive and sustainable in export of global healthcare services.

Growth of Medical Tourism

Globalisation and privatisation of healthcare along with transfer of medical technology, and cost effective medical innovations and technology in developing countries has significantly led to the growth of MTm, in the 21st century (Bookman & Bookman, 2007; Medhekar et al., 2014; Runnels & Turner, 2011). Medical travel is not solely driven by the customary medical referral from a general practitioner (GP) to recommend diagnostic tests and see a surgical specialist. In 2016, 11-million people travelled abroad for medical treatment. Out of which nearly 1.4-million were Americans, who travelled for cancer, heart-by-pass, dental-crowns, cosmetic-surgery and other short-stay outpatient procedures (Woodman, 2016). This rise in number of patients traveling abroad for treatment is due to marketing via magazines, MTm trade fairs, and the websites by private hospitals, government and MTFs, providing medical travel packages with tourism opportunity (Bostan & Yalcin, 2016; Das & Mukherjee, 2016; Fisher & Sood, 2014; Gan & Frederick, 2011; Gezinski et al., 2017; Lunt et al., 2016; Turner, 2011). The Asian MTm market is projected to reach US$ 14 billion by 2022, with Thailand, India, Singapore, and South Korea as leading countries based on MTs arrivals from countries and MTs spending.

Government of India, Ministry of Tourism (2015) has provided guidelines and financial marketing development assistance to wellness-tourism and medical-tourism. Indian government's visa-on-arrival scheme has increased the number of MTs travelling to India for surgery, as it provides 30 days to one-year stay, based on type of treatment (Garner-Insights, 2018). Increasingly healthcare providers and MTFs are using e-health advertising and marketing on the internet for disseminating healthcare information about availability and quality of surgical procedures. Therefore, MTFs need to have understanding of functional, computer, numerical health literacy for health marketing, and upskill their staff by employing allied healthcare workers or nurses who have the knowledge of medical conditions (Lewis & Lewis, 2015; Medhekar & Ferdous, 2012; Bodie & Dutta, 2008), as patients search various sources of information before they make a decision to travel abroad for surgery. Marketing of surgical-super-speciality by the private hospitals, MTFs and the government is essential for the development, growth, promotion and communication of surgical-super-specialities to attract foreign patients, in a competitive global healthcare environment.

Private super-speciality hospitals collaborate with MTFs to expand their businesses in different countries and seek to collaborate with international MTFs, healthcare hospitals, top medical schools, hotels, and airlines to connect with foreign patients. Accredited private hospitals and MTFs are having their business contacts and website included in the Indian government's official health tourism portal (http://www.indiahealthcaretourism.com/), which provides information on private hospital, available super-specialities, names and photos of famous surgeons, locations, language capabilities, travel, immigration and visa requirements. The important role of medical travel agents or MTFs is increasingly being recognised by the MTm sector and the hospitals in particular. Current data by web search shows results of India and Thailand having one of the largest numbers of MTFs websites to assist potential patients/MTs to plan their medical journey.

According to Alsharif, Labonté, and Lu (2010) study, nearly 50% respondents in India and 52% in the United Arab Emirates used the services of medical brokerage firms to help arrange their medical travel. This indicates that MTs whether experienced or first time MTs, engage the services of MTFs, to make medical, travel, and visa arrangements at the patient's source-country and the host-country of treatment. They play an important role of a mediator between the key stakeholders (hospitals, physician, patient, hotels, immigration officer, and interpreter in the host-country) who provide services to foreign patients as MTs, and healthcare providers /hospitals in different countries and potential foreign patients.

Medical Tourism Facilitators Role

Private hospitals in the host-county of treatment and the potential global patients, both need MTFs to connect the patients with the hospital, physician and other medical and tourism related service providers. Medical travel companies attract international patient inflows to the accredited hospitals registered with them and provide information to the patient to facilitate and coordinate patient's overall medical travel itinerary. Potential patient as MTs, once they decide to seek surgery abroad, they search the internet, ask family and friends who have had some experience and make their own medical travel arrangements to a particular country of choice and the hospital for treatment abroad. Alternatively, they may seek the assistance of MTFs to assist in making all medical travel arrangements. Finally, medical treatment could also be outsourced to MTFs, by private health insurance, government and private employers sponsored to find affordable, comparable or better quality of surgery abroad (Bies & Zacharia, 2007; Dalstrom, 2013; Gan & Frederick, 2011; Majeed & Lu, 2017; Ruggeri et al., 2015).

Growth in travelling for wellness and medical has led to the emergence of numerous MTFs within in a monopolistic segmented market structure, based on treatment specialisation as they try to differentiate their product and services based on treatment type, location of the hospital, availability of super-specialty, surgeon's expertise, supporting services provided by the hospital, country conditions and tourism opportunity. They have shop-front presence as well as websites providing one-stop-shop for medical travel in helping the patient to select the host-country, and hospital for treatment based on availability of super-speciality, doctors expert opinion, medical history and diagnostic reports, cost and treatment plan. Finally, if a potential patient makes the decision to travel, MTFs- confirm treatment plan, options for travel, tourism opportunities, travel-visa, to start treatment and post-surgery return travel plans and provide support during the stay in the host-country of treatment. Medical tourism facilitators, connect the potential patients as MTs to the private super-speciality hospitals and physicians. The traditional role of travel agents has changed and there is now a new market of niche role played by MTFs who provide concierge services and packaged deals to cater to the specialist healthcare and travel needs of the domestic or foreign patients (Frederick & Gan, 2015; Mohamad et al., 2012; Snyder et al., 2011; Skountridaki, 2017).

They–MTFs such as Placid-way, Medical-Retreat Abroad, and Tour-2-India-4-Health besides having knowledge of the country and hospital also need to have health literacy about various healthcare conditions, treatment types, hospital accreditation, physicians' expertise, and patient's requirements. Medical tourism facilitators should be accredited, multilingual and have knowledge about destination, tourists facilities, visa-requirements and patient safety, so that private hospitals and potential patients use their intermediary services of connecting patients to physicians (Cormany & Baloglu, 2011; Dalstrom, 2013; JCI, 2018; Medhekar & Ferdous, 2012; Mohamad et al., 2012; Snyder et al., 2011). Even though the aim of the potential patient is to seek medical surgery abroad, tourism in terms of sightseeing and shopping is usually combined with medical travel abroad if health permits pre- or post-surgery for recuperation.

Internet is used by hospitals, MTm marketing firms, and MTFs to communicate and diffuse all kinds of MTm information on various types of medical treatments (Agag & El-Masry, 2017; Frederick & Gan, 2015). Exploratory findings by Gan and Frederick (2011), from 46 MTFs in USA differentiated their services between eastern and western markets based on the scope of the countries, hospitals, variety of surgical-super-speciality, ancillary services offered and the involvement of medical professionals in the company. Three key components identified were physician's concerns, countries of treatment and travel related concerns of MTm and medical travel value provided by MTFs to their client's, and pre-post-surgery care to satisfy the MTs.

Johnston et al. (2011) studied the public health concerns for Canadian MTs, returning home after surgery. They conducted interviews with 12 MTFs, representing 10 medical-travel agencies, who sent 1300 Canadian patients each year to mainly developing countries of India, Thailand, Cuba, Mexico and Costa Rica. Their study found that the Canadians travelled abroad for surgery because of no waiting list, availability of procedure, affordable quality, anonymity, and appeal of tourism in the host-country. Furthermore, Johnston et al. (2012) conducted semi-structured phone interview with 32 Canadians to find out how they made a decision to access healthcare abroad. Three themes emerged from their study (i) sources of information like word-of-mouth (WOM) information from family and friends, internet advertisement and promotion, positive online testimonials of actual MTs on hospital and medical facilitators' websites, (ii) long waiting list at home, and (iii) personal and professional support from physicians. Private hospitals, medical-tour facilitators, medical hotels, and host-country can use WOM information exchange and internet to develop marketing strategies, coordinated in partnership with medical professionals and regulatory bodies, in patients' country of origin and host-country of treatment, to provide correct information to attract MTs (Lu, Wu, & Chen, 2016; Yeoh, Othman, & Ahmed, 2013; Medhekar & Newby, 2012).

Marketing discipline researchers have looked at advertising, promotion and communication of healthcare services, hospital branding and medical specialist's expertise at hospital and MTm facilitators websites (Crooks et al., 2011; Frederick & Gan, 2015; Medhekar & Haq, 2015; Turner, 2011). Due to privatisation of healthcare and growing competition, private hospitals are using MTFs to promote their surgical-super-specialities to attract global patient; which is looked upon by critics of MTm as commodification of healthcare (Han & Hwang, 2018; Voigt & Laing, 2010), as seen from the advertisement quoted below on a MTm facilitator's and medical travel company's website.

See Taj Mahal by the moonlight while your embryo grows in a Petri-dish, or Stay in five star apartment suite while you undergo hormonal treatment cycles. (Tripathi, 2013, p. 132).

Various studies have examined the websites of hospitals and facilitators to explore the types of MTm information online, to influence potential MTs intentions to travel abroad for surgery (Abubakar & Ilkan, 2016; Connell, 2013; Mason & Wright, 2011; Sobo et al., 2011; Crooks et al., 2011; Lunt et al., 2011; Lunt et al., 2010; Wagle, 2013).

Forgione and Smith (2007) examined 12 US websites of MTFs, and found that with poor English grammar, “website looks crudely done, and the impression one gets is distinctly that of a fly-by-night travel agency trying to cash in on the popularity of medical tourism” (p. 32). Similarly, Lunt and Carrera (2011) reviewed 50 European MTFs websites, and noted that it was essential for the hospitals and MTm facilitators to communicate in correct English, but also to advertise true information about the quality of medical procedures, facilities and physician skills and qualifications. A study by Cormany and Baloglu, (2011) which examined MTFs websites, in four continents North America (24), Europe (8), Africa (6), Central and South America (8) and compared and contrasted the general information and key services provided by the MTFs. They were distinguished from their competitors based on medical facility, air-travel, local transport, hotel, translation, concierge service, tourism option, international cell- phone medical appointment, pre/post care and safe transfer of medical records.

Similarly, Gan and Frederick (2011) examined the way MTFs differentiate their services based on accreditation, physician, hospital speciality, and tourism attractions to medical tourists. They-MTFs, perform various functions, provide value added medical travel focusing on quality of pre-post-care, medical, and travel arrangement, handling and transferring confidential medical records, personal manager, interpreter, and arranging sightseeing tours and holidays for rest and recovery. Further, Frederick and Gan (2015), found differences in MTFs website in Eastern and Western countries based on cultural factors of high/low context communication.

Regulatory standards and accreditation requirements can be made mandatory for the MTm companies and MTFs arranging travel for potential MTs so that patients make an informed choice, with an understanding of key ethical and legal requirements (Turner, 2010, 2013) to ensure continuity of care post-surgery, protect patient’s legal rights in case of breach of contract and clinical/medical errors. Furthermore, MTm related medical-legal regulations have to be in place, to ensure patient confidentiality, standard of healthcare, trained and certified MTm facilitators, and provide compensation funds to cover the cost of patient’s contractual agreement.

METHODOLOGY

The source of data was collected by studying the selected 21 websites of accredited medical travel companies (see Table-1). As it was a non-human desktop research, ethical clearance was not required. Google search engine was used to select the websites based on accreditation criteria and the numerous branded hospitals listed for medical treatment from India, Thailand, and other popular Asian medical tourism countries were selected. The social research method of content analysis was used to extract relevant data and information required for this research. The home pages of the companies provided variety of information for the potential MTs and the role of MTFs was identified along with steps involved in arranging the medical travel (Table-2). Content was analysed which identified key themes related to the role of the MTFs facilitators and concerns raised by the MTs. The websites provided information regarding costs, quality, waiting time, state of the art medical treatment, accreditation, MTFs as advocate and mediator between the patient and the physician/hospital to have a stress-free travel for surgery abroad by engaging their services. This assisted in proposing framework for patient centric global health public-private-partnerships (GH-PPPs) between the MTFs, MTs, and the key supply-side stakeholders to help coordinate medical journey for the patients (Figure 1).

RULES AND REGULATIONS FOR MEDICAL TOURISM FACILITATORS

There are hundreds of MTFs in India with web-based presence. It is necessary that MTFs should be registered by the government and accredited by National Accrediting Board for Hospitals and Healthcare Providers (NABH), and Joint Commission International (JCI), so that potential MTs who put their lives in their hands can trust MTFs to provide correct information to make right decision to travel abroad for surgery. American and International Society for Plastic Surgery (AISPS), American Dental Associations (ADA), NABH, JCI, AYUSH, are various accrediting bodies and International Society for Quality (ISQA) accredits all accrediting bodies and provide guidelines to employers, health insurance, MTFs, and hospitals worldwide to ensure healthcare quality. Other bodies are Australian Council on Healthcare Standards International (ACHSI), Accreditation Canada International (ACI), and Central Board for Accreditation of Healthcare Institutions (CBAHI) for countries in the Arab region. In 2016, NABH India, introduced rules to accredit MTFs. It has accredited three medical travel agents (a) AAA+ healthcare consultancy services of Mumbai and (b) Magnus MediToruism of Mumbai, and (c) Zylomt.com.

Accreditation by NABH giving a seal of '*Medical Value Travel'* for Medical Facilitators is voluntary and valid for two years to provide services which meet patient safety requirements to examine the accountability, trustworthiness and reliability of the MTFs (IMTJ, 2017). According to NABH, the medical-tour companies or MTFs are supposed to come up with the self-assessment criteria for performance indicators to demonstrate compliance as specified in the NABH criteria. However, national accreditation of medical travel agencies/facilitators is not sufficient to guarantee accountability, legal liability, and medical safety of international patients. Additional, international accreditation by JCI and other accrediting bodies is required to ensure that MTFs are ethical in their practice to act as a mediator between the potential patient, private hospital and the surgeon (Turner, 2013), for providing credible, reliable, and trustworthy information regarding quality of pre/post-surgery healthcare abroad. Facilitators should not put foreign patients' safety at risk by recommending overseas medical facilities, which are not accredited, performing illegal cosmetic surgeries or dealing with organ trade surgeries, which are not approved and available due to ethical and legal reasons, in patient's home country.

A qualitative study by Snyder et al. (2011), where 12 MTFs from a Canadian medical tourism company were interviewed in relation to their role, potential harm to the MTs host-country and home-country related to patient health, travel risk, safety, follow-up care after return, and public health issues. Their study identified three themes related to role of the MTFs towards foreign patients, healthcare system and MTm industry as a whole. However, their role was limited as a travel agent who refers the patient to a hospital and surgeon in a particular country. They—MTFs do not take responsibility for patient's legal liability in case of failed surgery and follow-up-care.

International patient search for information regarding travelling abroad for medical surgery from numerous MTFs websites, which link patients to famous private hospitals and physicians that they promote for specific healthcare condition. Informed patients do look for national and international accreditation of MTFs and search various blogs used by previous medical travellers regarding their services. In case of emergency, Zoylo Medical-Tourism is also offering air ambulance services to foreign patients in India, Nepal, USA, UK, Russia and Australia. MediConnect has received two national awards for being India's No-1 medical tourism company. It is also accredited by nearly all international healthcare accrediting bodies. Table-1 provides a brief list of accredited popular medical travel/tourism companies' websites, which link foreign patients to hospitals in India, providing privacy, confidentiality, transparency, accountability and quality of medical travel services. They collaborate with super-speciality hospitals accredited by NABH, JCI and ISQA, connecting patients to private hospitals overseas.

These medical travel agencies/companies are linked with super-speciality accredited hospitals specialising in cosmetic, hip/knee replacements, heart surgery, liver or kidney transplant, IVF-treatment and eye survey. Most of them have online forms for getting a quote, choose a country and hospital, plan

Table 1. Medical travel companies

	Medical Travel Companies	Web-links
1	AAA+ healthcare consultancy services	http://www.aaahealthcare.com/service/medical-value-travel/
2	Magnus Medi Tourism of Mumbai	http://www.magnusmeditourism.com/
3	Zoylomt Medical Tourism	https://www.zoylomt.com/
4	MedMonks	https://medmonks.com/
5	Hospicon India	http://www.hospiconindia.com/
6	IndHeal	https://www.indheal.com/
7	INDmed Travels	http://www.indmedtravel.com/
8	India Health Guru	https://www.indianhealthguru.com/
9	Medilinks India	http://www.medilinksindia.com/
10	MedMusafir	http://www.medmusafir.com/en/
11	Indus health plus	https://www.indushealthplus.ae/medical-tourism/
12	Concorde-MedicalvisitIndia	http://www.medicalvisitindia.com/
13	IndiCure Health Tours	https://www.indicure.com/india.htm
14	Tour2India4Health	https://www.tour2india4health.com/
15	Mediconnect India	https://www.medicalindiatourism.com/
16	Apollo Hospitals	https://www.apollohospitals.com/
17	Thailand Medical Tourism Corporation	https://www.medicaltourismco.com/medical-tourism-in-thailand/
18	Bumrungrad International Hospital	https://www.bumrungrad.com/
19	Medi Makeovers Medical Travel Group	https://www.medimakeovers.com/
20	Medical Tourism Malaysia	https://medicaltourismmalaysia.com/
21	My MED holiday	http://www.mymedholiday.com/country/malaysia

Source: Developed for this paper

your itinerary, treatment plan, travel to host-country of treatment, get treated and post-surgery care and return travel. Website are used by MTFs to advertise hospitals health tourism services. The common themes on the home page of top medical tourism company's websites are- that we provide affordable and accredited quality of access to healthcare, with latest medical equipment and technology in the best hospitals of India accredited by NABH and JCI and patient testimonials.

The "Zoylo App" is launched in India with a vision to expand its presence in every country to make healthcare an easily accessible and affordable service by giving the patients the "Right of Ownership to Choose and Decide" who, what, where, when and how much instead of being forced to accept whatever is available. https://www.zoylomt.com/

Medical Tourism Company in India for all medical tourism services under one website. We take care of your journey from starting to last. http://www.indmedtravel.com/treatments-india/

Indian Healthguru welcomes you to India for the best medical treatment. Medical or Surgical - treatment in India is affordable and with top-notch quality. https://www.indianhealthguru.com/

OPPORTUNITIES AND CHALLENGES

There are hundreds of medical travel agencies in popular medical tourism destinations having an online website for India, Thailand, Malaysia, Mexico, Turkey and South Korea. There are many opportunities for individuals to become a medical tourism facilitator/ professional by doing the formal online training offered by Medical Tourism Association-USA and start a medical travel agency. Similarly, the existing travel agencies can also add another segment of medical travel to their current businesses by collaborating with private hospitals and target this niche medical tourism market for surgical-super-specialities.

There are many non-registered medical travel agents or MTFs websites, referring foreign patients to hospitals, which are not accredited, resulting in failed surgeries, thus ruining the reputation of the travel agent, hospital and the host-country of treatment and raises many patient safety and ethical concerns (Mahuire et a., 2016; Mason & Wright, 2011). However, these agents are faced with many barriers and challenges in not only attracting the patients (Skountridaki, 2017) but also connecting and collaborating with excellent private hospitals, such as Bangkok hospital, Bumrungrad, Apollo Group, Wockhardt and Fortis. The websites of MTFs put emphasis on excellent quality, affordability, waiting time, higher success rate of surgeries, patient safety, post-surgery care, accreditation of healthcare facilities and taking care of MTs all travel needs in the host-country until return.

Table 2 provides steps for connecting and communicating the information between the potential international medical patient/tourist, MTFs, and the hospital at the host-country of treatment. Information from the medical travel company's websites is summarised and steps identified that are involved in making medical travel arrangement using the services of a MTFs or medical travel agencies.

Table 2. Steps for medical travel via MTFs

Steps	Steps for Medical Travel via MTFs
1	Potential medical tourists **search the internet** for numerous sites of medical tourism companies to make informed decision.
2	Contacts the **online doctor consultant and fill the query** form to get initial information and analysis of medical needs.
3	Once **decision is made to travel abroad for surgery**, provide medical records for consulting with the doctor and specialist.
4	Various **choices of hospitals, doctor and countries** where best treatment is available are provided along with costs estimates and guidelines to finalise medical travel.
5	Detailed **day-to-day itinerary** is prepared for the potential medical tourists, which may also include tourism.
6	International **patient care coordinator** takes care of all the services from interpreting to medical travel and tourism booking by air and hotel accommodation, local travel, personal attendant, foreign exchange, wheel chair access, and visa requirement at the source-country and the host-country of treatment.
7	Other **concierge services are also provided** at the host-country related to shopping, sightseeing, booking resorts for rest and recovery pre or post-surgery.
8	**Arrival at the host-country of treatment**- where the local patient care coordinator receives the patient at the airport, followed by hotel check-in. Further, accompanies the patient to the hospital for scheduled appointment and provides all documents including medical and tourism information.
9	**Meeting the medical team**- doctor, surgeon and the nurses who will provide medical treatment and hospital admission.
10	**Hospital admission and beginning of treatment**. Local patient care coordinator is in contact with the patient, hospital and the medical company at the source country of patient and host country and coordinates all appointments and activities for the patient.
11	Once the **patient is discharged**, based on the medical situation a post-surgery holiday for sightseeing is planned, with an attendant if required along with patient's companion (family or friend).
12	**Arranging for the return journey** in consultation with the medical team at the host-country of treatment.
13	**Arrival and pick up from the airport at home**. Post-return consulting and follow-up care and contact with the doctors in the host-country of treatment if required after reaching home.
14	Medical tourists / Patient **feedback and survey**.

Source: Developed for this paper

RECOMMENDATIONS AND POLICY IMPLICATIONS

Medical travel/tourism facilitators and their medical travel agencies play an important role as a one-stop-shop for the potential MTs. They play multiple roles from being an intermediary between the patient and physician. They make all arrangements related to travel, tourism and accommodation, interpreting service, payment, check for accreditation, legal requirements and provide informed consent to the patient and above all being an advocated for the patient in the host country of treatment.

Potential MTs either visits the brick and motor shop of the medical travel or connects to a MTFs website searching and requesting possible quotes for specific surgical speciality. Many MTs used the services of MTFs who are similar to a travel agent- when it comes to booking travels but still distinctively different with knowledge of medical terminology and health tourism literacy, in context of healthcare needs of potential patients, overseas hospitals, surgical-super-specialities accreditation of healthcare facilities, health insurance, and other aspects related to needs of patient. All the ground research work is already done by the MTFs regarding accredited hospitals, super–speciality, names of top specialists surgeons, availability of surgery, accreditation, costs, waiting time, post-surgery care, pharmacy, ambulance services, visa requirements for countries, local transport, accommodation, tourism and air travel costs, and the list goes on. Therefore, MTFs coordinate between various stakeholders in the MTm sectors: government immigration/VISA department, foreign exchange, airlines, travel and accommodation, ambulance requirements, medical/diagnostic reports, overseas hospitals, specialist surgeons and connect the potential patients/MTs to the hospitals and surgeons. MTFs are responsible for the following two key roles:

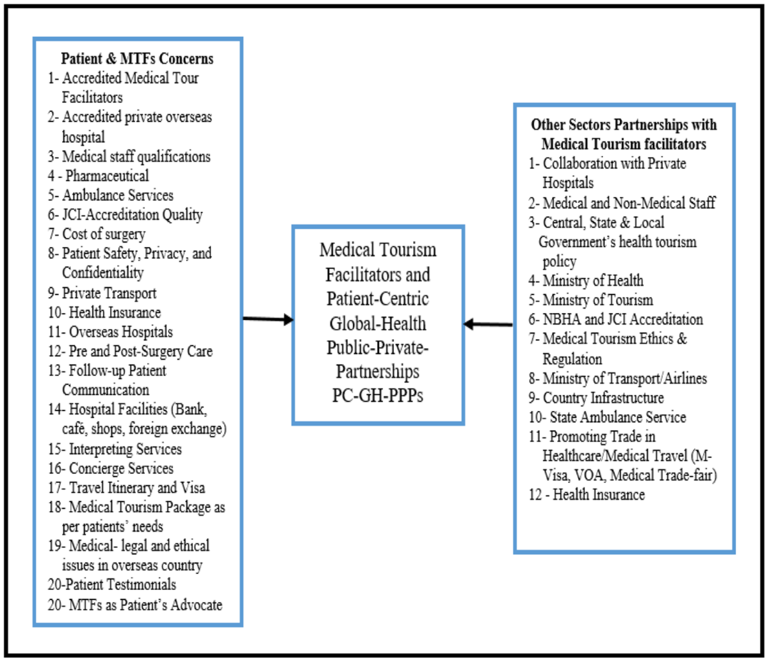
1. Role towards surgical-super-speciality hospitals and surgeons to promote and market their hospital brand, medical facilities', and surgeon/physician expertise (a) Act as a mediator to coordinate referral and appointments of patient with physician, and payment of bill transactions after the MTs services are fulfilled.
2. Role towards potential patient/MTs as an advocate to connect them with the healthcare providers: (a) helping the MTs to choose an accredited quality of super-speciality hospital and physician in the host-country of treatment. (b) Get price quotes for surgery, medicine and diagnostic services, post-surgery care, medical and travel insurance. (c) MTFs manage, coordinate and collaborate the flow of medical information, medical reports, taking appointments, and other allied healthcare services required between the patient, physician, and the healthcare provider in the host-country of treatment. (d) MTFs connect, coordinate and manage the patients' medical journey by making travel bookings, passport, visa, flights accommodation, local transport, pick and drop off from the airport, hospital and hotel accommodation, health and travel insurance, payment of bills, in the host-country, and acts as a health travel coordinator for patients with special needs. (e) MTFs is a paid advocate on behalf of the patient. They make all arrangements in the host-country of treatment, and connect with health and travel insurance, hospital, immigration and medical-legal issues in case of any medical and travel related concerns. (f) MTFs arrange for local shopping and sightseeing required by the patient and their travel companions. (g) MTFs is the main point of contact for the patient, when the patient is in the international hospital in the host-country and follow-up on behalf of the patient, with hospital and other related services after the patient returns home.

Figure 1 provides a framework for Patient-Centric Global Health Public and Private Partnerships (PC-GH-PPPs) which is required between the various medical and tourism sectors of the economy for successful delivery of packaged services and information by the MTFs to the medical tourists and address the concerns related to MTFs and patients as medical tourists.

Thus, overall MTFs not only act as intermediaries and collaborate to connect potential MTs with private healthcare providers and physicians but also help the hospital and country in the growth of international trade in healthcare services by targeting potential in-bound foreign MTs to a country such as India. Government of India has promoted medical tourism through its health tourism portal, medical-visa and medical-escort-visa category, besides considering as an export of healthcare services eligible for all incentives given to exports such as reducing tariff on imported medical equipment, access to prime-land for building hospitals, increased depreciation allowance on medical equipment and medical tourism trade fairs (Medhekar, 2012).

Potential MTs search the internet to contact MTFs to begin their journey to find quality hospitals, MTFs and medical hotels. Governments can establish information web-portals for MTm and list credible super speciality hospitals, surgeons' names and names of accredited MTFs businesses web-links to provide information to potential MTs. It is essential to set highest standards of JCI accreditation regulation, rules and of healthcare facilities, hospitals, medical staff and MTFs that could play an important role

Figure 1. Medical Tourism Facilitator and Patient-Centric Global Health PPPs
Source: Developed for this paper



in promoting access to trustworthy and reliable healthcare information regarding patient safety, quality of pre-post-surgery care. Government can also facilitate public-private-partnerships between the key stakeholders of MTm sector, hospitals, hotels, airline, tourism sector and the government for medical-visa arrangements to ensure high quality accreditation of the hospitals and MTFs, for the sustainability of the export of healthcare services sector.

CONCLUSION

The study established the important role-played by MTFs in connecting the patients with the healthcare providers and making all arrangements for the patients as MTs to travel abroad for surgery, and it is a continuously evolving innovative role. They—MTFs are the intermediaries between the foreign patient and the key MTm stakeholders such as hospitals, hotels, immigration-visa, sightseeing, airlines and local transport in the host-country. They also help the hospitals to attract foreign MTs to the host-country of treatment such as India. MTFs provide patient-centric healthcare services required by hospitals, MTs, airlines, medical-hotels and facilitate patient/MTs to choose and make right decision to travel overseas for medical treatment. Medical Tourism facilitators have a key role not just to connect patients with hospitals and physicians and vice versa, but also towards the source-country and the host-country of treatment. In case of limitations although the study was exploratory contributing to the role of MTFs, steps involved in coordinating and panning the medical travel, it has limitations. The research analysed the sample of accredited medical travel companies/MTFs website contents listed in Table-1 and relied on the information provided, which may not be accurate and the content can change over time.

Future research could explore qualitatively how patient-centred global-health public-private partnerships PC-GH-PPPs could be developed between the key global supply-side stakeholders of MTm to ensure effective and efficient hospital vertical-supply-chain relationships between MTm-hospital, MTm-hotel, and MTFs management. Studies could focus on qualitative and quantitative research from the patients and MTFs perspective the importance of the role of MTFs at home and host-country, who make all arrangement for MTs, key countries and main types of treatment demanded by international patients.

Research shows that MTFs are one-stop-shop front and play an important role to influence the foreign patient's decision-making process. Therefore MTFs, take the responsibility on behalf of the patient, hospital, airlines, hotel, medical and tourism sector to coordinate the logistics of the MTm supply chain by sharing information, ensuring confidentiality and privacy through their ethical professionalism. Such as medical travel itinerary, appointments with the hospital, physician, medical-visa and travel arrangements, accommodation, pre—post-surgery related care, and other concierge services such as local transport, foreign exchange, interpreting, personal attendant, essential shopping, sightseeing as required at the host-country of treatment. It is essential that the information provided is ethical so that patients can make an informed decision to travel abroad for surgery.

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KEY TERMS AND DEFINITIONS

Information Search: Medical travelers gather internal and external information from various sources, before they make a decision to travel abroad for surgery: for example- friends and family, brochures, television, health insurance, social media, YouTube, and internet websites of government, medical-tour facilitators, hospitals and accreditation bodies.

Medical Travel Agency: Any company, public or private, retailer or wholesaler, which sells MTm packaged tours that, may include doctors' appointments, health and travel insurance, ambulance service, personal attendant, local transportation, accommodation, food, local tours, and overall concierge services. MTFs facilitate and acts like an intermediaries to connect the potential patient with the hospital and specialist surgeon and makes all medical travel arrangements. They help to choose JCI internationally accredited hospital and surgeon in a country to meet patient's healthcare needs and make accommodation, sightseeing and all travel and visa arrangements act as an advocate for the medical tourist.

Medical Travel/Tourism: MTm is a branch of health-tourism. It is a phenomenon where a patient travels domestic/overseas, with/without a companion, for medical treatment. This could be invasive, and involve complex surgical procedures with the use of highly specialized medical technology and skilled surgeons, for the improvement of health and quality of life. MTs may combine it with a vacation if health permits at an exotic destination, pre or post-surgery for recuperation.

Medical Travel/Tourism Facilitator: Businesses that are involved in providing packaged MTm related products and services similar to Travel Agents. However, Medical Tourism Facilitators (MTFs) are difference as they provide information related to various complex surgeries abroad. MTF is a person or a company that helps to coordinate international patient's medical travel arrangements to the host-country for medical treatment, connects patients with the hospital in the host-country, and negotiates on behalf of the MTs, their medical, accommodation and travel plans.

Medical Traveler/Tourist: MTs is a patient who buys a medical product or healthcare service. MTs travels within a country or overseas, for the purposes of receiving medical treatment/surgery and engages in some tourism if health permits. In this research, a patient considers itself as MTs by self-description or by the description of the MTm hospital, complex types of super-surgeries, medical destinations, as well as the medical-tour facilitators. That is, whether the patient considers themselves as a MTs or if the MTm private hospital and surgery-type and medical-tour facilitators, health insurance, hotel and related tourism services considers the patient as a MTs.

Chapter 7
Insights Into South Africa's Travel Agency Sector With Respect to Service Quality

Vannie Naidoo
University of KwaZulu-Natal, South Africa

ABSTRACT

Travel agencies remain important points of call for tourists wishing to travel locally or abroad. In South Africa, the Association of South African Travel Agencies (ASATA) drives the travel agency sector. The primary aim of ASATA is to maintain and further improve a sustainable and profitable sector of its members by ensuring the delivery of a professional service to the travelling consumer. This service is achievable by the travel agency or tour operators through a strong relationship and open dialogue being present with all stakeholders in the travel and tourism value chain. Since tour agencies operate in dynamic, continuously changing environments, the concept of service quality is an important strategic tool that can be used by a tour agency to retain its clients and attract new clients. Word of mouth is an excellent tool that can create brand awareness and build customer loyalty towards a tour agency. Travel agencies that provide superior quality service in those service offerings to their clients can be leaders in the travel agency sector. This chapter employs the qualitative research approach and looks at unpacking literature on the travel agency sector. Service quality in the sector in South Africa is another key theme explored.

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INTRODUCTION

Tourism is an exciting industry that allows people to travel and explore unknown attractions and destinations in different parts of the world. If we look at the tourism sector worldwide, it can be characterised as a dynamic growing industry that generates millions of jobs in the world. Tourism also has a direct impact on contributing positively to the worlds' and a country's GDP. Tourism is a major catalyst driving economic growth in the South African economy. The Association of Southern African Travel Agents (ASATA) governs and drives tour agencies in South Africa. ASATA sets the professional, ethical and regulatory standards. This association works tirelessly to set out the ground rules that assist tour agencies operating in the country. Tour agencies are competing and operating in very dynamic and highly competitive environment. This paper therefore introduces the concept of service quality that can become a tour agency's competitive advantage to differentiate it from other tour agencies.

The themes in the chapter are:

- Tourism and its impact on the South African economy
- The South African travel agency sector
- Services provided by the tour agency sector
- Unpacking the concept of service quality
- The concept of Service quality and its implication on tour agencies

To begin the discussion, it is important to unpack the important issues theorists have indicated on tourism research. In the discussion below, the different views on tourism, with reference to how it affects the South African economy would follow.

TOURISM AND ITS IMPACT ON THE SOUTH AFRICAN ECONOMY

There are differing views by theorists on how tourism affects South Africa and the global economy. There is a very vibrant market for people to travel and see destinations in this world. Some theorists are of the opinion that the millennial and the educated working class spend their money on travel and leisure. In recent times, tourism has become an important sector across all regions worldwide. It has generated more income than any other sectors. According to Geldenhuys (2000) travel (and tourism) has existed since time immemorial. Elliot, (1997) indicates that travel and tourism is a vast, complex network of business, which may include activities, and travel carried out for leisure, family or business reasons, and usually has the following purposes: rest, entertainment, conducting business and/or personal development. Morgan, Pritchard and Pride (2011) argue that the tourism business has become a fundamental money-generating sector across regions all over the world. Tourism has grown at an accelerated pace over the last few decades since the end of the Second World War. It has become one of the world's highest priority industry and employer, with a contribution of 9% to global Gross Domestic Product (GDP) and creating 235 million jobs worldwide in 2010 (WTTC, 2010). According to Statistics South Africa (2018) in March 2018, the distribution of overseas tourists that came to South Africa was as follows: Europe, 167,370 (64,2%); North America, 40,560 (15.6%); Asia, 24,393 (9.4%); Australasia, 11,375

(4.4%); Central and South America, 10,454 (4.0%) and the Middle East, 6,362 (2.4%). The ten leading countries in terms of the number of tourists visiting South Africa in March 2018 from 'other' African countries, were: Nigeria, 4,349 (30.7%); Kenya, 2,104 (14.9%); Ghana, 1,760 (12.4%); Uganda, 1,001 (7.1%); Ethiopia, 913 (6.4%); Egypt, 654 (4.6%); Gabon, 459 (3.2%); Cameroon, 447 (3.2%); Côte d'Ivoire, 269 (1.9%) and Congo, 239 (1.7%).

The tourism sector in South African is a growing industry contributing to over R300 billion that is nearly 9% of South Africa's' GDP and supports over 1.4 million jobs in the country, (Department of Tourism Annual Report, 2014-15). Tourism is synonymous worldwide as the industry with the highest growth rate and greatest potential for job creation (Business Day, 2004). According to Statistics South Africa (2017), the total international arrivals to South Africa increased by 6.5% for the period April-June 2017 compared to April to June 2016. According to Statistics South Africa (2017) for the second quarter (Apr-June 2017), it was estimated that the tourism sector contributed about 731,398 jobs, which was about 4.5% of total employment in South Africa. This was a 6.3% increase compared to Quarter 2 of 2016.

Tourism can influence many sectors of the economy like the food industry, agriculture, banking, communication, insurance and transport to name but a few. Futter and Wood (1997) agrees and adds that tourist expenditure directly affects the tourism industry, but it also has an indirect impact on other sectors of the economy such as agriculture, manufacturing, food processing, and communication and also in services such as banking, foreign exchange transactions, postal services, transport and insurance. Among further recent regional development initiatives in South Africa are those relating to using the potential of tourism, which is a priority sector in terms of the NGP and has experienced major growth since democratic transition and the country's re-insertion into the global tourism economy (Rogerson & Visser, 2004). Yang and Fik (2014) argued that in developing countries, the local multiplier effects of tourism, as a by-product of the many forward- and backward-linked industries are supported by tourist flows/revenues and the spatial externalities that spill across geographic boundaries, have had tremendous positive impacts on local and regional economies. Lacher and Nepal (2010) posit that by linking tourism to other local productive livelihoods, not only can the positive economic and employment impacts of tourism be maximised but also the negative impacts of tourism monoculture may be tempered.

OVERVIEW OF THE SOUTH AFRICAN TRAVEL AGENCY SECTOR AND THE SERVICES IT PROVIDES

An overview of the South African travel agency sector and the services provided by this sector would follow. In South African, the Association of South African Travel Agencies (ASATA) drives the travel agency sector. This body came into existence in 1956. The intention behind the association was as a forum for the industry to promote professional service with security for both members and their clients. Currently the membership represents more than 85% of the industry, including the head offices of most of the major brands (ASATA, 2010). According to World Travel and Tourism Council (2015), most travel agencies and tour operators in South Africa are categorised as small and medium-sized enterprises (SMMEs). They represent a significant part of the country's economy. While specific statistics are not available on the contribution made by travel agents and tour operators, 679,500 jobs were directly generated in 2014 by the travel and tourism industry in South Africa, according to the 2015 report of the World Travel and Tourism Council. This number includes job opportunities created by hotels, travel agencies, tour operators, airlines and transportation services related to tourism.

Bieger and Laesser (2004) posit that travel agencies are a professional source of information; such intermediaries would possibly be included in the planning of trips characterized as follows:

1. Medium to long distance trips to destinations with regard to which the travellers cannot draw on previous experience
2. Medium to long lasting holiday destinations
3. Complex (sightseeing) and international commodity-type of trips (city trips and beach holidays)
4. Trips using commercialized types of accommodation
5. Those trips with a comparably short planning horizon

The types of fees charged by travel agencies provided in a journal called Successful Meetings (2002) are as follows:

- Provision of all travel and airfare possibilities
- Reissuing of tickets at cheaper prices
- Cancellation of travel arrangements
- Explanation of travel restrictions and security requirements to clients
- Recommendation of good accommodation and restaurants
- Availability during trips via telephone as well as after-hour availability for emergency purposes

The services provided by travel agencies are relevant and valuable to their clients. Olmsted (2012) adds that value created in these transactions because of personalised service that a travel agent provides is profound. The experience, knowledge and skills, of a seasoned travel agent can assist in established connections, access to deals and benefits not available to the public, as well as their ability to negotiate better prices for their travel clients. Kracht and Wang (2010) and Weaver and Lawton, (2008) comments that additionally, travel agencies are able to provide a safety net during trips which is not available should travellers do their own bookings. Top agents may furthermore be in the position to acquire benefits on travellers' behalf, such as upgraded hotel amenities and rooms, hard to get restaurant reservations, specialised tour guides, and access to otherwise exclusive events and destinations. Buhalis and Laws (2001) argue that value is created by the ability of a travel agency to facilitate the sale and delivery of tourism services from suppliers to consumers. Fuentes (2011) comments that traditionally, travel agencies delivered value by means of their ability to connect supply and demand in the tourism industry. Another aspect that affects the travel agents is the new ICT's and technology. The internet and ICT technologies are greatly challenging the travel agency sector. Travel agencies need to consider technology when designing their sales and marketing strategies. Currently, the internet and social media is affecting consumers or travel clients buying behaviour. Buhalis & Law (2008) argue that the development of Information and Communication Technologies (ICTs) and particularly the internet has had a profound impact on the travel industry.

Due to the rapid development of information technology, methods of doing business in the tourism industry have changed dramatically. The internet and social media technologies have become entrenched in this industry and more than proved itself to be a perfect tool, which assists in serving clients. Not only does it serve as a channel for travellers to search for information but it also allows the visualization of travel products and services through video clips and graphical images (Tsang, Lai & Law, 2010). According to Travel Pulse (2011) PhoCusWright, one of the leading travel industry research firms predicted that by the end of 2012 travellers would book one third of the world's travel sales online. Gretzel & Yoo (2008); Gretzel, Yoo, & Purifoy (2007) and Xiang & Gretzel (2010) posit that several studies have confirmed the importance of social media in searching for travel information and the important role they have in the trip planning and purchase decision-making process. Beldona (2005) argued that the internet is a reality of today's tourism industry; it has penetrated the decision-making process of travel as well as revolutionised how travel transactions occur. Olmeda & Sheldon (2001) adds that for travellers, the internet allows direct communication with tourism suppliers facilitating requests for information. This allows tour agent services and tourist products purchased at any time and at any place. Similarly, Roberts- Lombard (2010) argues that the travel agency industry in South Africa is competitive and sales driven. The current global economic recession and increased competition for a shrinking South African travel market necessitates travel agencies even more to retain their current customer base, which can only be achieved through successful service delivery. The establishment of strategic relationships with suppliers and the strengthening of such relationships provides travel agencies with improved access to these suppliers to obtain information on new product developments, to lodge queries and enquiries and expect the professional management thereof. Through this process, the needs and wants of customers are satisfied, ensuring that travel agencies can retain their current customers and successfully recruit new ones. Lessing (2005) indicated that the relationship between the travel agency and its suppliers continuously depend on the following principles, namely:

- The quality of the products being delivered by the supplier
- The quality of the service which suppliers deliver to travel agencies
- The willingness of suppliers to honour agreements with the travel agency trade
- The responsiveness of travel agencies to supplier queries
- The involvement of travel agencies in supplier product development

According to the Association of Southern African Travel Agents the factors that the travel agency industry in South Africa value in their relationship building initiatives with suppliers, can be listed as follows (ASATA, 2004):

- The knowledge of travel agency employees
- The price level of the products and services of the travel agency
- The availability of airline tickets and hotel accommodation
- The available alternatives for motor vehicle renting with reference to the motor vehicle companies and motor vehicle renting packages
- The availability and choice of national and international travel packages
- The brand management of the supplier

Interestingly, another important aspect that affects a tour agency is skilled employees. For a client to receive excellent advice and for the service to be of quality it needs properly trained tour operators. According to the National Biodiversity Institute (2010) human resources plays an important role in the functioning of the tourism industry. Certain skills are essential for the tourism learners enrolled in the education and training programmes. However, many employers in tourism have voiced their concern over the quality, performance and deliverables that learners bring with them when they enter the experiential learning employment programmes in their workplaces. Peacock and Ladkin (2002) and Earle-Malleson, (2009) argued that some employers in tourism view communication skills as the top priority, followed by IT skills. Employers rated generally transferable people skills above tourism knowledge when compared. Certain companies considered experience more important than a degree-level qualification. Saayman and Geldenhuys (2003) conducted a study amongst travel agents, tour operators and tour guides. Their study identified the following as important in this field of study: computer skills, arithmetic skills, telephone skills, business writing, listening skills, language skills, negotiation skills, presentation skills, leadership and social skills, organisational skills, interpersonal skills, research skills, ethical and social responsibility skills, and cultural sensitivity skills.

UNPACKING THE CONCEPT OF SERVICE QUALITY

Service quality is a concept not easy to unpack because it has different meanings to different stakeholders. However, the different theorist views and beliefs on service quality identified follows. Weitz and Wessley (2006) argue that service quality is a measure of how well the service level delivered matches customer expectations. Service quality is a result of customer expectation of what they expect from the service provider and how the service provider performs to meet those expectations. According to Kotler& Keller (2009) service quality is very important to attract and retain customers; this is due to the fact that customers derive the perception of service quality on the levels of satisfaction they experience with the particular business. Harris (2000) goes on to stipulate the rewards associated to excellent customer service. A major benefit is the creation of a unique competitive advantage for the company. This places the firm favourably in the mind of the consumer and positively influences the organisational image as a whole. It is for this reason that the organisation will then accomplish profit objectives, and organisational goals more efficiently and effectively. The quality of service can be instrumental to the growth of an organisation and poor quality detrimental to the firm. The role of the organisation is to take the necessary steps, develop and utilize the required policies, procedures and processes to attain high levels of service quality.

Berry, Zeithaml and Parasuraman known, as the pioneering fathers of service quality research and have developed the SERVQUAL model that tests service quality of products or services. The uniqueness of the SERVQUAL model is its 'application in many industries to test service quality, including the tourism industry. Berry & Parasuraman (1991) have conducted extensive studies and deduced that irrespective of the service, consumers evaluate services according to the same criteria. These dimensions are:

Assurance

Assurance refers to the skills and expertise of the service employees in addition to their ability to illicit confidence and trust in the consumers (Boshoff, 2014).

Empathy

According to Zeithaml & Bitner (2003: 99) consumers want to feel understood and treated with a degree of unique speciality. The degree to which firms empathise with consumers can be the driving force to the creation of a competitive advantage. Smaller companies use empathy to create their own niche market. These firms thrive and market themselves as being specialists in catering for individual customised consumer needs.

Reliability

Reliability is the backbone of an organisation and the most important service quality dimension. This service quality dimension encompasses all aspects of the organisation regarding the actual service, delivery, consumer complaint handling, price, durability, reputation, materials, reception, training, expertise and technology. Consumers want to associate themselves with organisations that deliver on their pledges and promises especially with guarantees of services effects, service attributes, service traits and service eminence (Zeithaml & Bitner, 2003).

Responsiveness

The ability to give the consumer what the consumer wants promptly. Responsiveness is also the readiness to provide help to consumers. (Boshoff, 2014).

Tangibles

The physical representation of the organisation is as important as the actual service offering. The physical representation of an organisation attracts new consumers and is the bases that new consumers use to judge the quality and standards of an organisation. Customer retention and consumer loyalty are important aspects of a successful firm but the most significant aspect is the organisations ability to attract new consumers and convert them into loyal consumers (Zeitham & Bitner, 2003).

SERVICE QUALITY, CUSTOMER SATISFACTION AND LOYALTY AND ITS IMPLICATION ON TOUR AGENCIES

The above section highlighted that service quality in the travel agency and tour operation business has a pivotal role in the customer satisfaction and loyalty. Thus, this section is devoted to understand the theoretical aspect of service quality, customer satisfaction and loyalty and its' implication on tour agencies.

Service quality has been receiving attention from global organisations, academic practitioners and marketing specialists. Service quality maybe perceived as an effective catalyst for customers to distinguish competing organisations (Zeithaml,1988). Service quality can also contribute to favourable market share and customer satisfaction (Hu, Kandampully & Juwaheer, 2006). Studies have revealed positive relationships between service quality, customer satisfaction and loyalty in the travel industry (Tian-Cole, Crompton & Wilson, 2002; Lee, Graefe & Burns, 2004). Other studies have further highlighted that customer satisfaction plays a mediator role between service quality and loyalty (Karatepe, 2006; Maxham & Netemeyer, 2002). Travel agencies face huge threats of direct competition from airlines, which are bent on removing them from the sector (Beedassy, 2002). According to Lubbe (2000), technological advancements have had a direct impact on travel agencies. The Internet has had a drastic effect on tour agencies, as more people become computer literate; clients do their own travel bookings via the Internet, with a consequent loss of income to travel agencies. South African Airways electronic ticketing services offers its travellers the option of booking flights without tickets. The airline sells directly to the clients and cuts out the use of tour agencies.

Travel agents exist in a very dynamic industry constantly faced with fierce competition coming at them from all sides. The only way to stand out in the sector is having service quality excellence that can assist in maintaining present clients and capturing a fair share of future clients. Investing in building solid relationships with their clients is crucial. This is the view shared and supported through the writing of Lessing &Visagie (2014) who stated that one must never underestimate the power of client relationships. The human side of why travel experts continue to thrive and survive is because of this. Reliability, assurance, empathy and showing consideration and care – these are crucial ingredients to success. Customers are not strangers. Customers are flesh and blood, the backbone of travel agencies. Travel agents provide not only a customer service role but also a relationship role.

As seasoned travel agents, Visagie & Lessing (2014), in their writing, provided seven steps on building and maintaining customer relationship:

Manage Your Customers' Expectations

It is important for travel consultants to manage customer expectations carefully as customers do their research and know a lot however, travel agents remain experts.

Be Pro-Active

By being proactive, travel agents get to be ahead in keeping client happy. A happy client and happy holiday equals repeat and referral business, which is crucial for travel agents.

View Problems as Opportunities

Problems that arise when booking holidays are the ideal chance for travel consultants to show their effectiveness.

Be Professional at All Times

Travel consultants should always behave in a professional manner to gain the trust of their clients. This behaviour should permeate throughout the contact with the customer, from a professional quotation, website, sales tools to information sheets and other services.

Offer the Best Product

Clients should be constantly wowed. Travel consultants should always strive to offer products and services that clients have not even thought about for their trip. To build strong relationships with their customers, travel consultants in South Africa should always show that they are reliable, professional and knowledgeable. The right supplier, and successful forging of a strong relationship between the travel consultant and supplier, will ensure that travel consultants can be all these things to their customers. Partnership is key in the travel industry, as all players in the value chain become a reflection and endorsement of each other, thriving as one entity and delivering exceptional service, fantastic product and expertise.

Be Fair

Travel consultants should always charge a fair fee for the work done and professional service. There should not be hidden costs and lack of transparency.

Be Personal

Travel consultants should share personal experience and the experiences of their customers with new or potential clients. Testimonials are a good reference point.

Backstroom (2008) argues that by focussing on the following aspects, the business can increase the level of customer loyalty:

- Acknowledge the presence of client immediately. Time is valuable to the customer and the business should therefore not waste the clients time;
- Greet the client with an enthusiastic smile and in a warm and friendly manner;
- Make eye contact with customers whilst communicating to them;
- Use the title and surname of clients;
- Use non-verbal signs to indicate to clients that their communication is important to the business and that the business appreciates their contributions;
- Treat clients, as friends and they will behave as friends.

FUTURE RESEARCH AREAS

The impact of technology on the travel agency sector needs further investigation. Future studies should focus on tour agency sustainability in a very competitive environment for developed and underdeveloped countries. In the age of uncertainty and terrorism, how can tour agency operators provide the best advice for their clients in order to keep them happy and safe should also be investigated?

A WAY FORWARD AND CONCLUDING REMARKS

The changing dynamics in the tourism industry has asked travel agents to relook at their strategies and take into account technology when providing their service. On-line travel agency services are now a new dynamic. Customers no longer want to call or visit a travel agent; they prefer liaising with them from the comfort of their own homes via the internet or SKYPE. Another important aspect of the travel agency service is service quality. Tour agencies need to ensure service quality excellence, as this can help them differentiate their service offerings from other travel agents. Positive word of mouth about excellence in service offerings can make a big difference in retaining clients and attracting new clients. The travel clients need to feel valued, like they are getting their money's worth, so travel agents need to ensure that their needs are satisfied. Clients at the end of the day must be happy with the travel packages provided by travel agents.

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KEY TERMS AND DEFINITIONS

Holidays: This refers to breaks and getaways that people take for leisure.

Service Quality: Refers to excellence provided to the end customer in the service offering provided.

Tour Operators: Theses are agents that provide advice and customise holiday and business packages for clients who are travelling.

Tourism: This refers to travel be it for leisure, business or holidays. Tourism is a very lucrative sector that contributes to county's GDP.

Travel Agency Sector: This sector is made up of private retailers or public service that provides travel and tourism related information and packages to clients who want to travel.

Chapter 8
Online Travel Trade in India:
Challenges and Opportunities

S. K. Gupta
HNB Garhwal University, India

Vijay Prakash Bhatt
HNB Garhwal University, India

Abhishek Vaishnava
HNB Garhwal University, India

ABSTRACT

India, as the second largest internet population after China with 330-370 million users which is expected to grow by at least 50 million yearly until 2020, is at the cusp of a digital revolution. Various reports show that India's revenue in the online travel booking segment amount to 569 million USD in 2018 and is expected to show an annual growth rate of 14.6% resulting in a market volume of 9,594 million USD in 2022. This article emphasizes the opportunities and challenges of online travel agencies (OTAs) particularly in India. For the success of e-tourism in India, it is essential to increase the operational efficiency of the staff and attitude/ behavior of the staff, delivery of services as committed, provision of customer data management and insurance coverage services. All of these are the keys for an excellent and prompt service delivery system and which effects the success of the online travel provider. A large youth population, changing lifestyle, plethora of travel deals and authenticated travel related information are some of the major opportunities and challenges for e-travel commerce in India. This article summarizes information on the challenges and opportunities of Indian online travel agencies, with a conviction that India will make a huge break through and be a success story particularly in online travel retail. This study will give insight to the industry players to understand the opportunities and challenges and develop strategies for retaining more satisfied users and increasing the number of repeat customers accordingly.

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INTRODUCTION

Planning and preparing for travel can be stressful and overwhelming due to the preparations needed in selecting and scheduling flights, arranging transfers, booking appropriate hotels, organizing other requirements at destination which requires consultation and assistance from an expert travel service provider/intermediary.But from the end of twentith century, internet has paved the way for rapid growth of digital/electronic business phenomenon across the world and made travel planning more convinient and less time consuming. Internet has created a dynamic competitive revolution in the way consumer shops or buys today. E-commerce became widespread and the most preferred mode of business transactions. E-commerce (electronic commerce) is often simply refer to buying and selling using the internet. People immediately think of consumer retail purchases from companies such as eBay, Amazon, MakeMyTrip, etc. But, e-commerce involves much more than just buying and selling online between organizations and customers and should be considered as all electronically facilitated transactions between an organization and any third party it deals with. Non-financial and other intangible transactions such as customer requirements for further information, violation of terms and conditions by other party etc., would also be considered as a part of e-commerce. A report published by Statista in 2017 cited that retail e-commerce sales worldwide amounted to 2.3 trillion US dollars and e-retail revenues are anticipated to grow to 4.88 trillion US dollars in 2021.

It is a well known fact that tourism has influenced the world economy to a large extent and tourism development is always seen as a basic instrument in economic development, alleviating poverty and advancing food security (Čačić, 2013; Richardson, 2010). Tourism industry creates a vibrant fragment of the economy of any nation and generates remarkable financial, social and political impacts, thus acquiring a significant role in the general worldwide economic and social development (Ma & Hassink, 2013; Temirbulatova & Borza, 2015; Wang et al., 2012; Weaver & Lawton, 2010). Holloway et al., 2009 characterizes tourism as the absolutely most imperative economic activity on the planet. It brings numerous advantages, particularly in terms of job creation and employment of individuals who provide tourism services (Pender & Sharpley, 2005; Webster & Ivanov, 2014) hence contributes directly and indirectly to the Gross Domestic Product (GDP) (Unković & Zečević, 2014). As stated by Taušer et al. (2015), GDP has critical impact on the buying force of consumers and in this way influences the economic development and the local economies. Universally, tourism has endowed the GDP overflow from the most developed economic states to those with lower Gross Domestic Product (Sekulović, 2012; Blanke & Chiesa, 2013).

Tourism industry is a consumer of a diverse range of information and the main user of its associated technologies (Cho, 1998; Renders & Baker, 1998). Information and communication technology (ICT) plays asignificant role in the growth of tourism services and helps in product promotion and efficient delivery. Information technologies certainly became one of the most important elements of the tourism industry, since the generation, gathering, processing, application and communication of information are very important for day-to-day operations in tourism and associated sectors (Poon, 1993). More importantly, information and communication technology has affected the way tourism organizations operate their business and distribute their tourism products in the marketplace (Buhalis, 1998; Buhlis & Licata, 2002).

Adoption of information and communication technology (ICT) at a large extent by tourism organizations lead to the emergence of electronic tourism, generally called as online tourism or e-tourism, and the online travel agencies (OTAs) which is fundamentally transforming the tourism industry worldwide. OTAs provide new channels for the global marketing of products and services and creating opportuni-

Table 1. Current and projected contributionof travel and tourism to GDP

		Worldwide in total GDP	India in total GDP
1.	Direct contribution, 2017	USD 2,570.1bn (3.2%)	INR5,943.3bn (USD91.3bn) (3.7%)
	Forecast to rise in 2018	4.0%	7.6%
	Rise by 2028	3.8% pa from 2018-2028, USD3, 890.0bn (3.6%)	7.1% pa from 2018-2028, to INR12,677.9bn(USD194.7bn), (3.9%)
2.	Total contribution to GDP, 2017	USD8, 272.3bn (10.4%)	INR15, 239.6bn (USD234.0bn), (9.4%)
	Forecast to rise, 2018	4.0%	7.5%
	Rise by, 2028	3.8% pa to USD12, 450.1bn (11.7% of GDP)	6.9% pa to INR32, 053.3bn (USD492.2bn), (9.9%)

(Source: WTTC Annual report, 2018)

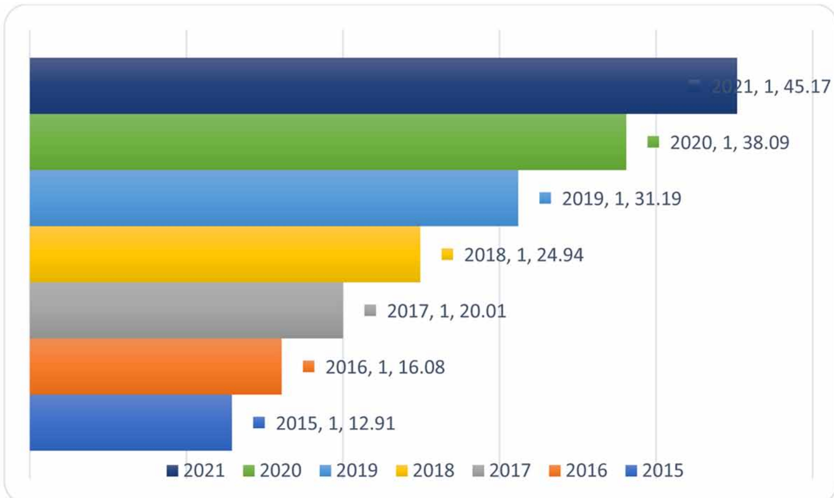
ties to establish new businesses providing information and other knowledge-based intangible products. The modern consumer of travel services is busy, young, educated and tech- savvy, professional and like to backpack who value time and money and want to enjoy planning and preparing travel without any hustle and stress (Gupta & Vaishnava, 2017). Online travel agencies and online travel services alleviate stress in planning and preaparing a trip by assisting the tourist in making appropriate decisions and in performing the pre trip formalities.Online travel market can be characterized by a wide range of travel deals, provision of 3D interactive tours, place description, time saving and convenience, variety of facilities and services, experience reviews by users, authenticated travel related information and customer care services which motivate people to plan, book travel services and products online. Further, online travel agency provides an environment for the creation of virtual representations of tourism destinations and activities allowing indirect experience that greatly surpasses the possibilities of traditional travel agents. Social media platforms, has increased the reach of information to demographically wide populace with different interests, motivations, expectations, preferences and behavioural patterns. People can share their views and experiences in the form of pictures, stories, travelogues and appreciate, reccommend or creticise any place, activity, product or service with the help of various social sites.

Table 2. Worldwide online travel sales

Sl. No.	Year	Worldwide Digital Sale (Billion U.S. Dollars)	Worldwide Online Travel Sales (Billion U.S. Dollars)
1.	2014	1336	470.97
2.	2015	1548	496.21
3.	2016	1845	564.87
4.	2017	2304	629.81
5.	2018	2842*	693.91*
6.	2019	3453*	755.94*
7.	2020	4135*	817.54*

Source: https://www.statista.com (* estimated)

Figure 1. Retail E- Commerce sales In India from 2015-2021 (in Billion USD Dollars)
Source: https://www.statista.com



Availing online travel services is quite convenient as most of them are automated or web-based. Online travel shopping or online travel retail is an arrangement of goods and services available online through electronic commerce medias mainly internet, intranet and worldwide web, which empowers the consumer to purchase directly from online shops at any time without stepping away from their home/work place. Individuals can book a trip at midnight without worrying about trying to reach an individual. Online travel agencies focus on discounted rates and fast self-service models that allow customers to create their own trips as one-offs or package deals.Global online travel sales have undergone an unprecedented growth over the past few years. E-marketer estimates worldwide online travel sales including airlines, car rentals, hotels, accommodation and transportation will rise from $612.91 billion in 2017 to $855.07 billion by 2021 (Global Digital Travel Platforms, 2017; e Marketer Report, 2017).

In India,the journey of online travel agency beganis recently and was started in the year 2000 with the establishment of MakeMyTrip. Initially, there were a lot of challenges like limited consumer acceptance and access, lack of airline trust to the new method of ticketing, industry practice of paper tickets and technology infrastructure limitations. Over the last 16 years, there have been considerable technological advancements and the market share of online travel agencies in India have grown drastically with the market leaders being Indian online travel agencies like Makemytrip, Yatra and Cleartrip followed by the international online travel agencies like Expedia and Travelocity. ‘Phocuswright’ magazine acclaims that now, in 2017, India is the world’s fastest-growing major economy, and has one of the fastest-growing travel markets as well. Strong gains in online travel will continue to drive penetration upward and by 2021, 45% of gross travel bookings will occur online. Online hotel distribution in particular is beginning to gain momentum and accommodation sector will be the country’s quickest growing online travel segment. Meanwhile, air transport is the major segment, and the development of regional airports will open new routes and increase tourist arrivals.

According to a report by World Economic Forum, 2017, India has secured 40th rank in Global Travel and Tourism Competitiveness and shows 3.86% change in performance since 2015. As per the Compound Annual Growth Rate (CAGR 2018-2022) estimates, India's revenue in the online travel booking segment amount to 569 million USD, in 2018 and is expected to show an annual growth rate of 14.6% resulting in a market volume of 9,594 million USD in 2022. The report further mentioned that the online market's largest segment is the 'package holiday' segment with a market volume of 3,007 million USD in 2018.

Availability of better offers, provision of information, purchase decision, user orientation and appropriateness are the major determinants for the acceptance of online mode of travel purchasing. Apart from these, minor factors like higher degree of accessibility, clear presentation of choices and trade-offs, money saving, provision of accurate and updated information and ease and joy of planning and buying travel online also influences the acceptance of online travel portals and are the key factors which has to be emphasized by OTAs in order to increase the number of online customers and eventually in retaining the satisfied consumers (Gupta & Vaishnava, 2017).

OBJECTIVE

The primary objective of the study is to identify the major challenges and opportunities of Indian OTAs. The study further attempts to present a SWOT analysis of current scenario of online travel agencies.

METHODOLOGY

The current study is an attempt to identify and describe the challenges and opportunities of online travel trade in India. Qualitative inquiry and analysis fit to this purpose with stronger sensitivity than a quantitative methodology could offer. Methodology uses context, individual experience, subjective interpretation of various websites, books, journals, downloaded articles, authorized government reports in order to understand and explain conceptual, inceptive and contemporary information related to different aspects of the study.

DISCUSSION

The present article attempts to understand the problems and challenges faced by the OTAs in India and tries to find out the solutions with the help of SWOT analysis. Before really discussing the problem and challenges in front of the OTAs, it is important to identify the factors responsible for the popularity of OTAs and characteristics of users and consumers of online travel products and services. We are aware that, acceptance and adoption of technology by masses is reshaping many aspects of life including our life styles, consumption patterns and decision making (Dangwal, Sakalani & Anand, 2010). It has reshaped the way we used to planand book travel products and services too. (Beckinsale & Ram, 2006; Acilar, 2011; Jelfs & Richardson, 2012). As mentioned in introductory part that modern online travel service users are professional, tech-savvy youths from middle class income level who want the travel planning and booking as a less time consuming process with plenty of options of travel deals, rich specification of the product with images, easy comparision of travel services and products, ease of booking from home or office without confronting an agent in personally, security and transparency in financial transactions, compensation for mishaps and losses, effective complaint tracking, last-minute updates to the mobile and authentic consumer reviews. Hence, it becomes important for OTAs to understand consumer preferances about opting online mode of travel booking and design a web portal accordingly.

Hyde (2008) found that in order to foster the satisfaction among the users of online travel consumers it is essential to consider three phases in decision making including extensive information search for potential traveling needs, information search for specific travel plans and information search for reservation needs. Apart from this, the most important part of the online travel purchase is the freedom of sharing the views and opinions by consumers about their satisfaction about the OTAs and services availed which is very decisive for the marketing and, to a great extent, influnces the decision of other people planning to avail similar products and services.

Challenges of OTAs

Rapidly evolving technology and complexity of consumer buying behavior along with so many other variables like intense competition in the market place and changing marketing and promotional strategies have posed a number of challenges in front of the OTAs for retaining a satisfied consumer base and surviving in the market. Following are the major challenges for Indian online travel agencies.

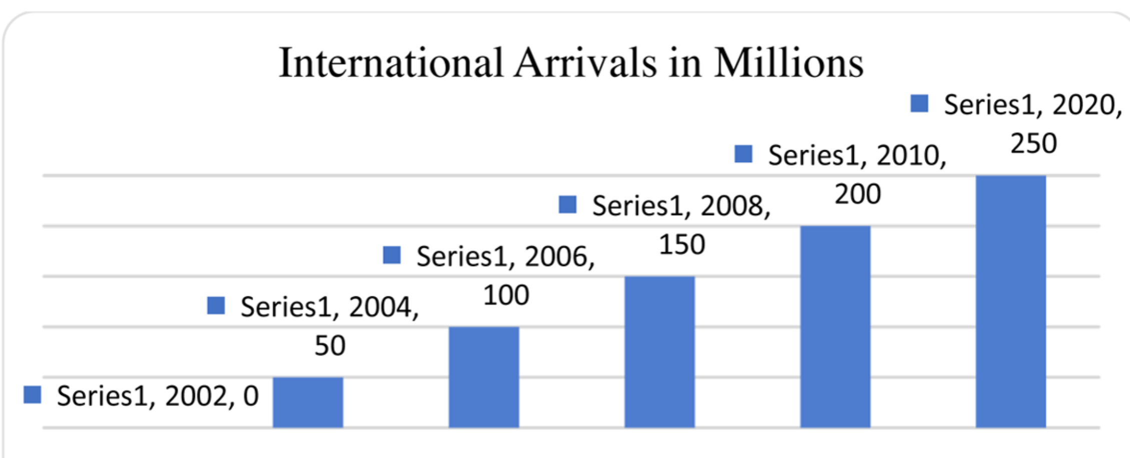
Figure 2. New value web
(Source, UNWTO)

Everchanging Consumer Expectation

In the current centuary, rapidly changing demographic scenario has changed the pattern of consumption of Indian consumers. Acceptance and adoption of information and communication technology by masses especially the social media platforms have led to the easy prolification of information about various products and services along with experience reviews by the consumers who have already used the product and services have made the modern consumer more aware, more demanding, seeking best value for the money and on the top of it the best experience of product and services. UNWTO estimates that around 20% of the total international tourists travelling the world are young people. In comparision to any other market segment, youth and student travelers are leading with innovation and paving the way for responsible tourism. By 2020 there will be almost 300 million international youth trips per year. According to UNWTO forecasts,with 330-370 million population of 10 to 24 year olds, India has the world's largest youth population which is estimated to grow by at least 50 million yearly till 2020.

Youth tourism in India is an emerging concept and it would be an important marketsegment for the future, not just economically, but also because its capability of bringing about the change in physical, social and cultural edifice of the destination region. WYSE Travel Confederation's research suggests that youths are more responsible young travelers and not deterred from travelling by terrorism, political and civil unrest, diseases, natural calamities with cutting edge of using new technology and oriented towards learning from their travel, and contribute to the sustainability of places they visit. (https://www.wysetc.org/research/). So, it becomes essential for Indian OTAs and Governments work together with other public and private organizations to reap the benefits of youth travel. (http://icsiindia.in/youth-tourism.html).

Figure 3. International youth trips per year
Source: UNWTO



Cutthroat Competition

Todays technology led era have given power to the user to promote and sell their goods and services directly to the potential customers through shopping cart platforms. Anyone can launch an e-tourism online store/web portal to attract niche market segment and start providing all sorts of tourism products. Such an easy and wider reach to the potential customers have resulted in cutthroat competition among online travel retailers. Hence, it becomes necessary to keep an eye on the competitiors' strategies for surviving in the market. Apart from effective business strategies, building customer trust and loyality is of utmost importance for retaining satisfied customers. While talking in terms of Indian OTA companies, it is a herculean task to build the customer trust because majority of Indian customers, except youth and tech-savvy people, tend to buy products physically because they doubt the security and safety of online transactions (Payne & Frow, 2005; Peter & Oslon, 2008)

Unusual/Common Buying Behaviour

It is evident that the e-tourist does not purchase the same way as a traditional travel shopper does because of plenty of information and diversity of products under reach. They can use travel portals like Yatra.com, Makemytrip.com, etc., to search for products information and may seek recommendations on social media or anyone of travel recommendation web site like Airbnb, HomeAway or Tripadviser. They read product reviews on their smartphones while in-store and pay for purchases using all various online methods through different payment gateways. Online portals have radically changed the way we purchase and communicate online. E-tourists can easily get distracted with the experience reviews, especially through social media. Hence, the unpredictable behaviour of the e-tourists is one of the most difficult challenges for OTAs to formulate effective marketing strategies and ensuring satisfaction.

Safety and Security Issues

Majority of Indian rural population is unaware of internet and it uses. Surprisingly, most of internet savvies or urban population is also suffering from poor knowledge of online business and its functionalities. Very small proportion of internet users are aware of the online corruption and fraud and about how to avoid it. A survey revealed that 50% of Indian online users are unaware of the solution of online security. Buchanan and Gilles (1990) stated that a big concern about information technology on service delivery channels is security. The ultimate satisfaction of any value added facility offered to the customer is arrived only with the security level attached to that facility (Taylor & Todd, 1995). The most important online shopping security issues are related to personal information, primary financial data and debit credit card information. While online travel portals can provide basic guidelines about avoiding online frogeries to individuals shopping travel products online. Consumer behavior trends due to online shopping security concerns have the ability to make or break a firm's e-commerce efforts (Forsythe & Shi, 2003). E-travel portals have an opportunity to educate the customer about how to shop online safely.

Provision of Authenticated Information

O'Connor (2000) stated that today, consumers are more interested than ever in gaining as much information as possible regarding tourism products and services in order to minimize risk in buying and enhance their satisfaction. Travelers cannot pre-test the product or easily get a refund if the trip does not meet their expectations; hence access to reliable, accurate, timely and relevant information is crucial to help them make an appropriate choice.According to Ghasemaghaei, Maryam and Hassanein (2013), information has a critical role in customer decision making process, as it would guide them in the online environment as the physical presence of the product is absent. (Khristianto et al., 2012). Four important dimensions of information quality, namely accuracy, content, format and timeliness have been discussed by many authors. These dimensions would give satisfaction to customers, especially to those with time constraints and also to the impulsive buyers (Khristianto et al., 2012). Customers are more likely to have better judgment when they are given accurate information. Therefore, the more quality information provided by the online retailers, the better the decisions could be made by customer with less time and effort, which consequently leads to an increase in customer satisfaction.

Customer Data Management

Privacy and security issues are the two critical factors for trust building, manipulating and deploying user's adoption of online buying. Usuallythe concept security is related to safety. Security and Privacy is an index used to compute and determine the perceived security and privacy of internet banking. (Belanger et al., 2002). It has been considered very important to manage customer data well and providing security to personal information of customers is important for winning trust of customers (Furnell & Karweni, 1999; Bestavros, 2000), as there are chances ofillegal use of the customer information by other firms (Hoffman & Bateman, 1997). During online navigation the perception of cyber-consumers about service providers is that they lack control over the accessto their personal information by others. It causes lack of trust. Security is defined as the ability of the website to protect personal information of the customers from any unauthorized use of information disclosure during the electronic transaction (Guo et al., 2012; Chellapa, 2002). This is because, security and privacy issues play an important role in developing trust in the online transaction and/or the website. (Guo et al., 2012). Security can be understood in two aspects: the first aspect is related to the data and transaction security; and the second aspect is regarding the authentication of the user.

Insurance Coverage

Insurance is generally considered to be a complex product, requiring a certain level of understanding in order to make an informed decision, and in good faith (Hoffman, Howe and Hardigee, 1991). Butcher, (2003) stresses the importance of having a comprehensive cover of travel insurance. In general, most of the people becoming truly conscious of travel risk and insurance only when they experience travelling consequences first hand, as opposed to a priori efforts to educate themselves about risk and insurance. Somer Kniestedt and Steffen (2003) conducted a study on travel health insurance and found that mishapps, illnesses, injuries and financial losses are inevitable during travel and inconvience caused can be lessen to some extent by having an insurance cover. Providing insurance as a travel product to consumers is a challenge for online travel agents as it increase the price of package and secondly most of the time consumers are not interested in buying travel insurance.

Apart from these major challenges there are also a number of minor challenges including experience reviews by users, prompt customer care services, higher degree of accessibility, clear presentation of choices and trade-offs, money saving, provision of accurate and updated information and ease and joy of planning and buying travel online which can be converted into opportunities through their observation and well planning.

Problems and Challenges of OTAs: A SWOT Analysis

SWOT analysis is widely and most frequently used as an analyzing tool for internal and external environments in order to obtain a comprehensive understanding of a situation and developing short term and long terms business startegies (Kolter, 1988; Glaister & Falshaw, 1999; Wheelen & Hunger, 2007). SWOT stands for companies' internal strengths and weaknesses, and external opportunities and threats. In order to develop and present the SWOT analysis of Online Travel Agencies, current study has analyse the content of various studies made on different aspects of OTAs and related them in context of Indian OTAs.

Strengths

- Plethora of travel deals and authenticated travel related information
- Ability to sell product online- "one-stop-shopping"/high technology to approach customers
- Eye catching packages- Travel agencies not only provide the image of the country to the concerned parties but also attract them to visit a country.
- Consumer's direct reach to the principals
- Effective customer relationship program
- Highly visible website
- Excellent range of choice of holidays- customization and flexibility features are available for designing holiday packages as per needs of individuals
- More cross marketing/diverse distribution channels
- Impressive and quality service/dxperienced business units/highly trained staff/responsibility and accountability of employees.

Weaknesses

- Continued growth of competition means limited market share.
- Local company with international ambitions.
- The struggle to continuously offer new and exciting trips while maintaining the level of quality that is established over time from repetitive trip offerings. Competitor can offer similar product quality.
- Not adopting to new habits and/or patterns quickly enough. It results to the existing industry player to remain as onlookers on the technical revolution and allows new players to enter the huge potential market.
- Lack of public service vehicles management to local company in provinces.

Opportunities

- Large youth population- Growing number of young professionals with the recent dot.com boom.
- Changing lifestyle.
- Continued expansion for online sales- Recent quarter earnings show positive financial turnaround possible with cost saving initiatives. Embracing technology and use of it enhances the customer experience and ultimately the business. Ample scope of starting improving dynamic online packaging to include more services that just air, hotel and rental cars.
- To become the ideal Indian Online Travel agency- There are fewer agencies out there today than 15 years ago.
- Social media marketing.
- More positive role from the Government of India in terms of framing policies.
- Educate the customer, especially millennials and the younger generation since very few of them know, on what a travel agent does and the benefits.

Threats

- Customers can prepare their own holidays and put the package together by saving 10% on the cost of using a travel agent.
- Rough competitiveness of the agency in the region.
- Changing consumer behaviour.
- Not being able to inform the customers what you offer.
- Ignorance of online trade by country people.
- Growing competition from low-cost carriers.
- Lack of basic infrastructure and accommodations for tourists in rural areas of the country.
- A down turn in the economy will affect people´s travel habits especially in context of India.

CONCLUSION

The findings of present study suggest that increasing number of internet users in India is a good sign for OTAs in India in order to strengthen their consumer base. It has been observed that a large number of online travel service providers are dealing in retailing of hotel rooms and airline tickets but availability of complete tour packages online is limited. The study identified advances and innovations in ICT, ever-changing expectations of consumers, cutthroat competition in online travel market, unusual/common buying behavior towards online travel products, safety and security issues, provision of authenticated information, customer data management and provision of insurance coverage as major challenges in online travel retail in context of India. It will help OTAs to convert the weaknesses into strengths and threats into opportunities.

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KEY TERMS AND DEFINITIONS

E-Commerce: Any business activity that can be conducted over the web.

E-Tourism: The way tourism organizations conduct their business and, in particular, the way organizations distribute their tourism products in the online marketplace.

Online Travel Agencies: Online travel agency may be defined as business providers who specialize in offering comprehensive travel-related services and/or products online.

SWOT Analysis: A SWOT analysis is a simple but powerful tool for understanding an organization's resource capabilities and deficiencies, its market opportunities, and the external threats to its future. SWOT analysis has been used by academics and organizations not only for identification of the key issues concerning a strategy formulation, but also for its execution.

Tour Operator: A tour operator typically combines a tour and travel components to create a holiday. While considering tourism business information and technology, the tour operators examines bookings such as transportation, sightseeing, accommodation, etc., planned in advance.

Chapter 9
Online Competition in the Distribution Chain:
The Retailer's Perspective

Patricia Vieira
Mercado das Viagens, Portugal

Emese Panyik
Universidade Catolica Portuguesa, Portugal

ABSTRACT

Until recently, travel agents have been the principal intermediary between travel suppliers and consumers, with information as their primary trade. However, changes to information and communication technology (ICT) and the beginning of the internet have the potential to allow travel suppliers and consumers to interact directly. Today, consumer websites that integrate global distribution systems (GDSs) are no longer only an emerging threat but show fierce global competition between travel agencies and tour operators worldwide. Subsequently, one of the most pertinent questions today is how local, small-scale travel agencies respond to these market changes and what practices do they use to maintain their comparative advantage and offer competitive services? However, despite the relevancy of this issue, literature is generally scarce on travel agency strategies to confront the competition of consumer websites. Thus, in order to address this question, this article provides an analysis on the advantages and disadvantages of new technologies are available to travel agencies and strategies and practices that travel agencies can use to compete with websites.

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INTRODUCTION

The internet has had a huge impact on the purchasing behavior of consumers in recent times. Europe is without a doubt, a digitally sophisticated region. Twenty percent of the world´s internet users are Europeans, according to the study from online travel market and Internet World Stats, Germany uses 82,7% overcoming UK, France and Italy with only 58% (Hotelmarketing.com, June 2013). An investment in broadband and technology has contributed to this share. Internet adoption, specifically broadband is higher than in the rest of the world. The global internet users aged from 25-74 are the most likely to use travel services. The preferred location to book a trip is at home or workplace through mobile device. Only a small percentage uses a travel agency to fulfill their needs (Hotelmarketing.com, 2010). With these results growing and extensive over the past years is the tourism industry increasingly investing into their online presence and to destination management systems (DMS) in terms of assisting destinations with these functions due to their lack of technological understanding?

Customers looking to book a trip no longer need to visit an agency; they can go online to companies such as Expedia, E-dreams, and Travelocity to book an entire trip themselves. Furthermore, airlines and hotels themselves also have cut out the travel agent in total by allowing customers to book tickets and lodging directly from their sites. That's an unpleasant fact for travel agencies, who have traditionally relied on being seen as a necessary intermediary between customers and the services they require.

Right now, traditional travel agencies are being threatened not only by integrated tour operators, which control their own distribution channels, but also by the expansion of alternative distribution channels such as the Internet/ e-commerce, this process is called "disintermediation" . By definition, disintermediation refers to"... suppliers getting closer to their customers and eliminating all types of intermediaries that obstruct this process and add needless costs"(Wardell, 1991).

The competition between travel intermediaries is based on the need to reach the clients directly and as fast as possible, and with the Internet it is possible. Suppliers have the opportunity to use the Internet as a tool to promote their products and services directly to end-users and thus try to avoid the commissions paid to intermediaries. They normally pay a commission per holiday package or an individual purchase such as of airline tickets or hotel booking. Traditional travel agencies relied to that commission to survive with their business. The airline industry had also ahuge impact with this decline by taking a number of important measures regarding the level of commissions paid to the travel agencies for their services. Capping or reducing these commissions – these days zero commission is the norm – represented a strong blow for ticketing agencies that used to rely on the reservation fees charged to airlines.

What happens nowadays is that the price of a flight ticket offered by a travel agency is often higher than the price that can be obtained by booking directly from the airline company. "This is a disloyal competition, if we confront the retailerwith this issue, they give us an answer somehow like this, what can we do, this is our price... " (Patricia Vieira,Conference IPCA " JornadasTécnicas de Agentes de Viagens e OperadoresTurísticos&Turismoparatodos"2013). A travel agency who depends on retailers and wants to survive is forced to reduce their commission gathered from the airline itself. Now, one can ask, but aren´t their regulations that safeguard/promote fair competition? The answer is simple: no, because the regular airlines have to compete among themselves in order to keep up with the low cost airlines. Their*modus operandi*is mostly through online bookings; they can offer a simple procedure and low operating cost and provide the customer with low rates and any additional services. Due to this growth of low cost airlines, airports acknowledge this emergence and hail the existence of those airlines that can bring new passengers. On the other hand, in order to face this rivalry, the regular airlines made alliances among them and joined forces, by creating `a club` concept with rewards for loyalty. Examples include the 'miles and more' programme of Lufthansa, incorporated in the 'Star Alliance', which allow the customer, among others, to upgrade seats and follow their trip online. Their development was linked to the ability to capture sophisticated customer data.

Hence the question arises, how can a traditional agency survive in this fast emerging system?It is generally accepted that they have to change their business model to more 'web-friendly' approach to compete. Example to see in the websites of Almeida Viagens[1], a quick analysis is made of the website and noticed that there is no application to book directly from the website. The website is only presented online because nowadays, 21st century, it is a demand for a company to have a website with contacts and information about the company.For further details, the costumer is forced to phone or contact via e mail to the agency. Interesting fact and cutting edge is that they offer trips for disabled people 'viaja sin barreras' but on the other hand it would be outstanding if the application works. Several trials have to be made and at the end there is no result, and again the customer has to pick up the phone or write an email to obtain an answer

Despite these weakness, sales figures still appear to favour traditional agencies as according to the article (Growth of the travel Industry Online) "60% of travel planning is still done offline in Europe, people firstly seek for opinions and share experience amongst their circle of friends and social networks, after being informed they pass on to the next level which is to search for the best bargain in a travel agency. In Germany (2011) according to ystats.com "… customers preferred travel agents for more expensive travel arrangements and online booking for cheaper tours."On the other hand is Britain the leader of travel planning online, more than half of all consumers avoid traditional travel agents altogether to and book their holidays instead. With the purpose of understanding better this fierce competition this paper aims to explore howlocal travel agencies face the competition of global consumer websites and what practices do they use to preserve a comparative advantage regarding customers` preferences To this end, the article first reviews the existing literature on the emergence of online booking agencies and their impacts on the tourism distribution system. Second, shows along some real examples of a small travel agency-based in the countryside of Portugal as a case study to identify practices through the everyday experience of a small-scale player.….

THE EMERGENCE OF ONLINE BOOKING AGENCIES: AN OVERVIEW

Mobile and portable devices, from laptops and tablet PC to PDAS (Personal Digital Assistants) and smart phones allow immediate action from planning to booking travel and offer a significant computation power, storage and portability (Buhalis and O´Conner, 2005). Mobile devices are heavily used for booking travel as mentioned in the article from Marketer report published in May 2013. Almost every people has booked or researched through a device. These new devices are our day-to-day office, people can´t imagine life without them, and theseare their personal assistants combining planning, scheduling, ticketing, travel expenses dynamic information and decision support all in a single concept. But in retrospect, booking flights and trips electronically is actually a relatively new invention, despite its omnipresence nowadays. In fact, three different technological waves have accompanied the tourism sector: Computer reservations systems (CRS) in the 1970´s, Global distribution systems (GDS) such as the appearance of Amadeus, Galileo and Sabre in the 1980´s and the Internet in the 1990´s.

Although the first two technological waves introduced significant changes in the industry, there had always been a need for an intermediary to directly reach the population because their language was so complicated and their systems was so complex that only travel agents knew how to use them. Another reason for the system being known only in travel agencies was, that they didn´t constitute brand name that can be recognized by consumers as they have no direct access to the system. People relied totally on the help of a travel agent to book a trip but it changed drastically with the fast development of the internet and in addition to this there was also a growth of the B2B (Business-to -Business) and B2C (Business to Consumer) in the mid of the 90´s this brought a change in how tourism products were distributed. As a result it created conditions for the emergence of a wide range of new tourism eMediaries[2] (Buhalis& Licata, 2001). Suppliers in the tourism industry saw on this euphoric development an opportunity to expand their business and its profit, mainly airlines companies, car rentals and hotel chains developed e-Commerce[3] applications and appeared with direct access to their reservation system such as the major airline company British Airways (www.britishairways.com) . While the traditional travel agencies were forced and busy to change their business into more internet friendly business. This disintermediation went up to other level when multi-supplier web pages, Orbitz (www.orbitz.com) and online agencies appeared such as Expedia (www.expedia.com). A new concept arise called online booking. To keep up with these changes the GDs have also developed applications for the consumer example to see in Travelocity (travelocity.com) which is owned by Sabre.

For the end consumer, it seems that there are endless ways to get your travel arranged. From classic travel aggregators to especially luxe vacation packages at a discount, the selections available online make it easy to book nearly any sort of trip at any time and everywhere with the appearance of smart phones and androids. Buhalisand Wagner (2013) have acknowledged thatconsumers make use of the internet, Web 1 and Web 2 and browse online for inspiration about their potential next holiday destination.

Travel agents are no longer seen as the advisor, helper; people became more independent in travel planning since they receive more information within a “mouse click”.

In this population if you don´t belong to the age that uses the net, then you won´t get a chance to belong to that particular group that is named ‘independent’, DIY[4] they don´t need helpers to do their transactions in a bank, pay their bills etc. they do it alone online. Fact is that Mother Nature is applauding this decision; tons of waste of paper was thrown away in each household when those bills arrived in your post box. Now, with a simple transaction and mouse click you can get access to your bank account or bills from public utilities. Another positive consequence of this DIY process is that now we see more frequently people travelling, people that don´t want or have time to contact or pass by a travel agency book their entire trip alone.

One conclusion is made very quickly, ICT turned out to be an imperative tool. However, this process didn´t happen in a year or two, this was a long-term process, people first were very apprehensive to book online, only over the years many changes have been made by the suppliers such as improvement in secure payments methods, user friendly system, rapid information search and online booking and confirmation. Buhalis and O´Conner (2005) explain this phenomenon for the raise in e-commerce/ tourism: “ … because, they become more linguistically and technologically skilled and can function in multicultural and demanding environment overseas.” The empowerment provided by the internet to the “new” tourist let them search for a good bargain with more knowledge, and encourages them to seek exceptional value for money and time.

Ronnie Cheung and Pamela Lam(2009) arguedthat Customers are looking for one-stop shopping that is intuitive and convenient to use. They don´t have time to waste in search, they want information that is relevant and useful. Travel agencies cannot provide answers right away; they need time to make their own research.

Another negative aspect for the travel agency was that: "people that have used a traditional agency realized that some were business-orientated, and therefore, the interest of travel agencies will be placed before that of the customers" (Rob Law et. al 2004). People feel sometimes that the travel agency is only there to make profit and not to look for the best bargain for your holiday. In other words means that people loose trust with their intermediaries.

RESEARCH METHODOLOGY

In order to evaluate the emergence of online bookings and their impact on travel agencies, a small agency in the countryside of Portugal in the North region was chosen as a case study to explore what small-scale travel agencies do in order to survive with their business and compete with the online travel agencies.This research was developed based on close monitoring of the travel agency function and self-experiencefor the last past months.

Characteristics of the Travel Agency in Focus

This travel agency was created in 2009 by three business partners, they choose to begin with a franchising, a Spanish franchising created in 2004 and represented in four countries worldwide (Brazil, Mexico, Portugal and Spain). Their customers'profiles are mostly private with travel experience. But over the past year, more and more companies began to require their services for business travel. The travel agents which were two usually work with a selling platform called "Airmet"[5] which offers everything what a traveler needs, tourismretailers from accommodation up to car renting and insurances. The agency can contact directly the retailers when not getting a specific answer online for their needs. The profit, which the agency makes, is divided into fixed cost, such as paying salaries, rent and paying the royalties of the franchising system.

Typology of Consumer Websites

Before the beginningthe typology of the consumer websites, must understand first, how really use the web. Number one 1 fact is that "we" don´t read pages, we scan them. One of the very well-documented facts about Web use is that people tend spend very little time reading most Web pages. Instead, we skim or scan them, looking for words or phrases that catch our eye. Half of all online travel searchesare driven by 13 words, with search terms dominated by "cheap" and "discount" agency. We are usually in a hurry. Much of our Web use is motivated by the desire to save time. Steven Krug: "As a result, Web users tend to act like sharks find what we´re are looking for, or we die". Visualization and User friendliness are the keywords for online travelling service 2013.

It is believed that for the usefulness of a business web site to ensure long-term profit one needs to consider both advertising strategies to ensure increased visitation to the web site and also strategies which will enhance the customer experience in all phases of the purchase process, including both the pre- and post- purchase phase. (Maria Lexhagen, 2008 in Saeed et al., 2002-3).

Consumer websites have one general goal in common; the costumer must come back and book again. A process called loyalty. In tourism we have two kinds of tourist, the business traveler and the leisure traveler. It is proved that a business traveler who uses his smart devices book quicker than leisure traveler, because business traveler goes always back to the site was he/she is used to book and doesn´t have time to compare fares. If they find something that works, they stick to it.

With the leisure traveler is a different process, they always look for the best bargain, they compare first before they give their information. And with the increase of social commerce people want to be sure that they have made the right decision or are grateful to the decision maker process that for examples travel blogs, twitter or even Face book can provide they are also known by user generated websites. "There are two reasons you should visit a customer review site. One, you can gather valuable information about your next vacation and two, to share your experiences with other travelers researching their vacation. After all, you rely on other people's opinions when doing your research, so it's only fair to give back to the community" (Victoria Bourbon).

So, with this result in mind online agencies have to keep up with the information and conduct studies what motivates tourist, how they make decisions, what they think of the products they buy, how much they enjoy and learn during their holiday experiences. For this they have to make their own marketing research. Five points that a costumer looks always when surfing in a online travel website:

1. Visualization. If the website is user-friendly; according to Steven Krug ("What´s the most important thing that I should do if I want to make sure my web site is easy to use? " Answer is simple. It´s not "Nothing important should ever been more than two clicks away… "If so, a costumer loses interest.
2. Rapid information.
3. Up to date fares. Constant up to date content.
4. Low fees charged, secure payment methods
5. Quick e booking confirmation.

What happens now is that travel companies are missing opportunities by failing to learn as much as possible about their customers. There is a lack of dedicated understanding to tailor products. In turn, sales and marketing capabilities must be designed around each of those customers. In other words, companies must become the technology-driven equivalent of the perfect human travel. It seems that the trends of booking sites face now a slowdown if not a total decline, sites such as Expedia, Travelocity. Expedia for example launched days ago on the 17^{th} an online interactive travel game to gain costumers back. The second fact is the unlikely resurrection of the traditional travel agency: as a result people became fed up the time draining quirks and the impersonal service of booking travel online, consumers are turning again to human beings. (Koch et. al., 2008)

This happened hours ago with a traditional travel agency in Portugal an agency I work for and right away before finishing this article, one real example that I can point out directly is that Mr. Paulo X wanted to book a round trip to visit his wife who was working at the moment abroad, due to the lack of time and he didn´t want to use his credit card he called in an agency to help him booking so, he phoned and gave all the details for his flights. So far, perfect situation, the travel agent began the search and booked in just a few minutes his flight and send to the customer via e-mail the confirmation and all the details.

Then, another situation occurred with the same customer, while his journey to work he checked his e mail and suddenly realized that he had given the wrong dates for his flights. The travel agent received again a phone call from Mr. Paulo X and he apologized that he was mistaken about the dates and ask them to correct his flight. One question came up instantly to my mind; would it be possible with an online booking? The answer is it depends, as an experienced traveler and agent I now the procedure to take when something like this occur. Firstly there had to be sent several e-mails to the online platform because they normally want to this in written form, then when calling to the platform to the customer service number it is always a long-distance call which is very expensive, and then if you are lucky you get right away to the person who is in charge for those situation, otherwise you need to explain again and again to different people and tell them what happened and why they should alter and last but not least it depends what is saying in the policy of reservation says. Insider tip, I can give you right now is that you should always read what is written in between and policies of reservation. If the policy allows it then, there is a good chance to alter your flight, but there is always a fee that they charge. And normally such fees are really unfriendly. Sometimes happens that they cost more than the flight itself, but not in this case. It really depends where you do your booking. However, with a simple phone call could Mr. Paulo X make his alterations, and the nice travel agent rebooked his flight. He was so happy that he for sure will return to book his next flight or even a holiday package. With a simple e mail Mr. Paulo received his e-ticket, Murphy (2012) says, that there has been a recent success fueled by a new breed of travel agent:"Representatives who are in tune with consumer demands for speedy service. Today, agents are connected with their clients through e-mail, Twitter and text message."

Law et al.(2004) conducted a studyas I argued before to succeed as a traditional agency you must first elaborate a well and they wanted to know how the emergence of Internet affected the traditional agency. And they came to the results that all respondents agreed that travel agencies perform better than travel Web sites in terms of the human touch and personal services. This is the major key to success within this demanding process. Larry Olmsted wrote for Forbes magazine that true experts, are consultants, and many prefer "travel advisor", because their advice, expertise and connections are of great value. Theydefined marketing strategy, thinking, what I can offer new, how I can show it to my customers, who is my target. If it is the case, you have to think in redesigning the website; make it user-friendly; think of visualization having in mind "Less is more", possible with online booking. The same travel agency in Portugal is facing with its country an economic rescission but they soon realized that the use of Web 2.0 can bring new customers, they began to be very active with the social networking sites it is an order and it is a low-cost marketing for the agency. They analyzed through free programs visitors profile of their website and Face book. The results of this analysis were that 48% of the visitors were female and the average age was 24-38. So, they soon launched special campaigns for their female public, they appealed to share their travel experience, post photos of their special moments on their journey. Special notification with special discounts were send through e-mail .Yes, it is online but they offer the human interaction that online review and booking sites can´t and this can help create niche, and just in two weeks their fans growth went from 7 people talking about this to 40 people, there is a growth of more than 100%. Similarly, "People look increasingly to social media for advice and recommendation, marketers need to make certain they are part of the consideration set. " (Qualman, 2013).

Another thing that they did were, they created in their website apps for smart phones androids for the mobile generation; imagine a newsletter with all the useful information in simple QR-codes, you are calling for interactivity with your customer. Now imagine, a newsletter providing visualization of the hotel that you are going to book. It is possible with the augmented reality which can be useful tool in the tourism industry.

To possess such sophisticated programs can be very expensive but there is always an alternative to start with free programs such as VRML Pad [6], what the small agency did was, to incorporate into their newsletter a picture created with VRML of the hotel which they were promoting special fares for the summer holidays. People could download the applications for their smart phones and visualize the hotel of the special offer.

The results of these strategic marketing was very positive, only these past months their selling grows regarding last year 25%. When the CEO of the travel agency was asked about how he faced this emergence of consumer websites he revealed that as a traditional travel agency, open to the public, must have one thing in mind "to satisfy their customer, satisfied their customer…"

DISCUSSION OF THE RESULTS

To use or not to use a travel agent? Some tourism researchers have argued that the traditional distribution systems could be threaten or even replaced by electronic distribution systems (Buhalis,1998) and that the Internet could be the primary force for disintermediation . Others, however, have stated that even if the volume of online travel sales and marketing keeps growing, travelers still rely on travel agents for providing the human touch and professional services because they can help to create experiential itineraries and secure deals that travelers would have difficulty putting together independently, such as the afterhours tours flights, upgrades or rooms sold-out in hotels (Olmstead, 2012, Cheung, 2009, Laverty). How valuable would it be if an expert could tell one to stay at hotel A but avoid hotel B, or choose the great snorkelling excursion but skip the cruddy biking tour? Counselling on what to do and which services to choose, based on personal experience or that of colleagues and customers, there are some aspects in favour where a travel agent can shine. Some people enjoy trip planning, while others consider it an arduous chore. A further and significant point in favour to use a travel agency is that research for even a simple trip can consume hours. Part of what people pay for with a travel agent, assuming paying extra et al., itis for someone else to do the research and present the best options, making the process less time-consuming for the customer.

Takingboth views into consideration, this paper argues that both online and traditional travel agencies will eventually remain equally important in the travel and tourism industry, and both channels will supplement each other to serve travelers to their greatest satisfaction.

CONCLUSION

There is no doubt that millions of people rely nowadays on internet for working, leisure and travel, but there is no question, that to reach to those millions of people only the internet can provide such service. So, instead of looking to the internet as a rival, why not looking to internet as a free tool of marketing process for traditional agencies? Online agencies shouldn´t been seen as the main competitor, they are wasting their precious time with that. Traditional agencies should reintermediate and renovate their business model in the emerging marketplace. Studies proved that people are coming back to human contact; they are fed up with speaking to machines. In case of an emergency, people phone to travel agent, not to the online portal. So, it´s crucial to understand what trends travel agencies need to be watching to ensure that they stay ahead of the game and one step ahead of their competitors.

To be profitable, travel agencies must sell the value of their services and expertise on prices to sustain long-term relationships with their customers. This means that they have to consider the impact of new technologies and identify cost-efficient service-fee management solutions to meet their business requirements.As proved in this paper there was an example how an agency made alliances with technology and developed electronic commerce by themselves.

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ENDNOTES

[1] Spanish franchising created by Imaculada Almeida in 2004, represented in three countries (Brazil, Spain and Mexico).

[2] Abbreviation for electronic Intermediaries.

[3] Abbreviation for electronic Commerce.

[4] Abbreviation for Do it yourself.

[5] Belonging to the company called Argulógis and since 2006 represented in Portugal.

[6] Abbreviation for Virtual Reality Modeling Language.

Chapter 10
Strategic Analysis of the Contemporary Tour Operation Industry:
Insights From Emerging Economic Jurisdictions

Zibanai Zhou
Midlands State University, Zimbabwe

ABSTRACT

Tour operators and travel agencies are the fulcrum of the tour operation industry given their eminent role in the tour operation sector value chain. This chapter addresses an underrepresentation in the current tour operation discourse in the period post WW2. To put the matter into context, at the global stage, fundamental changes have occurred since the end of WW2, notably political cum socio-economic and demographic shifts, advances in education, and increases in per capita income due to dual family income among a raft of other variables. These have arguably boosted demand for packaged tour holiday. However, in spite of the highly fluid environment, there is little academic research on emerging economic jurisdictions in the TO and TAs sub-sectors' strategic intent in light of such profound developments. Very few researches have attempted to interrogate these pertinent issues in the context of emerging markets` view point. This chapter seeks to bridge this gap by analyzing how these fundamentals have informed and redefined the contours of the TO and TAs landscape. The chapter lays claim on and envisages to make theoretical contribution by advancing the frontiers of knowledge in the following specific domains of multi-destination theory, TO and TAs product development, population demographics, TO and TAs work ethic, and TO and TAs commitment to environment protection philosophy which have been understudied in the contemporary travel and tourism literature discourse.

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INTRODUCTION

Many popular destinations that have had an influx of tourists have successfully succeeded in developing an image that is recognised internationally courtesy of the indefatigable efforts of travel intermediaries (Alen, *et al,* 2012). Tour operators and travel agency enterprises have been more pronounced in well established and mature Western tourism markets in the Global North, and since the great leap forward necessitated by the advent of jet engine in the 1950s, tour operators (TOs) and travel agencies (TAs) have not taken advantage nor leveraged on the ubiquitous adventure travel and tourism opportunities available in the so-called emerging tourism markets. The international traveller`s insatiable appetite for authentic, and unadulterated adventure tourism experiences in the developing world is a reality that should be celebrated upon by TO and TAs. To date emerging market economies have embraced tourism as an alternative economic development strategy against the back drop of perennial crop failures, and tumbling of mineral prices at the world market (Greenwood, 2007; Leiper, 1989). What is missing in the current tourism discourse is research that speaks directly to what the writer deems the 21st travel and tourism imperatives in the mould of multi-destination paradigms, population demographics, corporate social responsibility (CRS), harnessing ICTs, and commitment to the ethos of environmentalism in the context of emerging economic jurisdictions. For a very long time, emerging economic jurisdictions have been burdened by negative perceptions in traditional source markets and have largely remained on the periphery of tourist travel itineraries (Fleischer and Pizam, 2002). Tourist destinations in developing countries have been conspicuously missing from the global adventure tourist map, and this anomaly needs redress. The ever increasing and insatiable desire to see the unseen, and to explore the unknown, are strong indicators pointing to a bright tour operation sector in the foreseeable future. There is convergence that emerging tourist destinations have all the necessary natural and artificial tourism resources, which can be leveraged upon by TO and TAs. TO and TAs as the main promoters should be at the forefront marketing and launching emerging market destinations on the catalogue of established destinations.

This chapter seeks to contribute towards improving the global image of emerging economic jurisdictions, with special emphasis on authenticity and unspoilt nature as the unique selling points. The discourse is emboldened by Bradley (2009)`s observation that despite the advent of ICTs and Internet, most people who go on vacation still like to book trips through TAs essentially as a way of taking the stress out of the planning process. Bradley (2009) and Bantwal, (2009) further acknowledged that TAs help travellers to save money on flight, accommodation, and cruises. Furthermore, the chapter would argue that TO and TAs are technocrats in the travel and tourism sphere who are deeply ingrained with the bolts and nuts of the industry hence their importance in the foreseeable future can only be ignored at one`s own peril. In support, Raza (2010) declared that TAs are not yet obsolete. This chapter would argue that despite suggestions from recent tourism researches insinuating that TO and TAs are becoming less popular in most European countries as a result of the tremendous internet possibilities this discourse would submit that this narrative does not hold true in the emerging economic jurisdictions where Internet penetration is still very low, hence their importance is still very much appreciated. This position is buoyed by empirical research whose findings have consistently affirmed that universally people place their trust in traditional TAs more than they do in booking over the Internet, more so in that tourists do not prefer to use the Internet booking when travelling abroad and to distant destinations. The trust and security that tourists have when booking face to face with an agent and the feeling that someone is responsible for their trip or package tour realisation informs the writer`s argument.

Tourists show a high level of trust towards agencies or intermediaries within the destination that have the precise knowledge and information about the resources and the overall situation within the destination. In the global tourism market, the role of TO and TAs is handy in introducing a new and unknown destinations in the market particularly if there are significant difficulties in connecting the destination with the most important generating countries. This is an unenvied conundrum that emerging economic jurisdictions are grappling to extricate themselves from. The role of intermediaries is further put on limelight when it comes to complex package tours, when package tours involve travelling from distant source markets where there is a high degree of risk. In addition, the role of intermediaries is far more important in scenarios when higher numbers of vacationers choose organised tours as opposed to the number of tourists who opt for individual travel. Therefore, the break through into the market for emerging economic jurisdictions is impossible without the various forms of cooperation and scaffolding of TO and TAs. In the tourism value chain, TO and TAs are an irreplaceable plank to the destination through the provision of a range of services to individual tourists and tourist groups alike. Their considerable knowledge about destinations and connections with various participants on the side of tourism supply enable them to create and deliver high quality products at a lower cost (Maria *et al,* 2012).

The tour sector market place is not static. Fundamental market changes on the demand side of the tour sector are sweeping across the global tour operation sector. Changes in customer preferences and tastes, population demographics, advent of ICTs, consumerism and environment activism are cases in point. These are the realities which are fast gathering momentum on the tour operation horizon that TOs need to respond to with a sense of urgency by re-visiting product offerings, re-calibrate factory settings, embracing in ICTs, engaging in a robust HR training and development to prime industry skills, innovation, re-alignment of relationships with supply side principals, and by projecting a good corporate citizen image through responding to increasing calls for sustainable tourism by minimising their adverse foot prints on the environment. This can only be achieved by packaging travel itineraries that are compliant to the tenets of sustainable tourism.

It is incumbent upon TO and TAs to revisit their product offerings given the reality of the emerging of the multi-destination paradigms, shifts in the population demographics that saw the emergence of the middle class in developing countries and an increasingly ageing population in the mature Western tourism markets. Cognisant of this, it cannot therefore be business as usual for TO and TAs given the magnitude of seismic reverberations accentuated by the ICTs revolution in the manner 21st century tourists are transacting business. It is instructive that TO and TAs change their work ethic by harnessing ICTs and prudently deploy the ICTs as an ally to aid product delivery efficiencies, since the advent of ICTs cannot and would never replace the human element. In addition, TO and TAs must ride upon the wealth of their experience and provision in real time of up to date travel and tourism infomercials, continuously upgrade and develop the skills of their human resource skill base, and also increasing their visibility as responsible and good global corporate citizens by engaging in CSR, which promote environmentally friendly touristic experiences. It is the writer`s submission in this write up that the survival of TO and TAs would largely be informed and dependent upon how they would respond to the multi destination concept, customisation of product offerings to suit the changing population demographics, harnessing of ICTs and its prudent deployment, leveraging on their primary role of being repositories of up to date travel and tourism information, continuous investment in HR training and development, and involvement in CRS. These should be underpinned by the provision of touristic experiences that are neither intrusive nor detrimental to the environment. These are the key issues that are the focus of this chapter`s analysis and discussion as the yarn unfolds. The preceding gamut is at the core and resonates with TO and TAs` strategic intent in the rapidly changing tour operation environment to ensure success.

METHODOLOGY

Primary data were solicited through a self administered questionnaire survey administered on four major tour operators and two travel agencies, one resource person from a destination management organisation and one resource person from a national tourism board in Victoria Falls. Victoria Falls was selected as the study site because of its richness in providing data on tour operation business. The town is the epicentre of tour operation business since over 90 per cent of regional and international tours are destined and ends in Victoria Falls. In addition, data were augmented by expert opinions gleaned from two travel consultants, and ten international tourists purposively intercepted at Hwange national park main entrance gate. The travel consultants were roped in so that they could provide insights on travel trends, travel market dynamics and factors likely to influence tour operation business in future. HNP was added as a data collection point upon the realisation that it is one of the world`s renowned and busiest national park visited by tourists of different stripes from across the globe. This ensured collection of data relevant to address the aim of the chapter. Thematic analysis was used.

RESULTS AND DISCUSSION

The analysis of results shall follow the following themes: multi-destination trips, emerging markets, population demographics, ICTs revolution, environmentalism, human resources, and product development and their implications on tour operation business and how TO/TAs are responding in the context of emerging markets.

Emerging Markets

Emerging markets are economies that are in transitioning stages growing rapidly from an intermediate to becoming fully developed economies. Emerging economic jurisdictions encompass new tourism markets largely in central and Eastern Europe, Latin America, the Middle East, Asia and Africa. Such markets have huge potential and excite investors of all stripes. Tourism demand in emerging economic jurisdictions is increasing, for example, China, India, Nigeria, South Africa, and Brazil. Emerging markets are characterised by an increasing per capita income, are increasingly becoming favourites for foreign direct investment (FDI), are becoming investment destination alternatives to advanced or highly developed economies. Emerging markets are placed in between least developed economies and advanced economies on the economic development level ranking. Emerging markets comprises more than half of the world`s population, account for a large share of world output, and have very high growth rates (Globaledge, 2008). It is further projected that by 2050 emerging countries particularly Brazil, Russia, India, China and South Africa (BRICS) would surpass the developed countries such as the US, Japan, Germany, UK, France and Italy (Wilson and Purushorthaman, 2003). Emerging economies have vast tracts of underutilised resources. In tourism, emerging markets offer alternative holiday and vacation options that are exotic, authentic, far away off the beaten track of the western tourist destinations. The increasing need for exotic and authentic tourist vacation products saw the increasing number of people visiting emerging tourist regions. Tourism sectors in emerging markets are booming with central government prioritising its development, enjoying above average growth rate. This is a golden opportunity for TO and TAs to create market awareness of the tourism resource dividend within the emerging markets for packaged tour holiday sought after by tourists tired of packaged tour holidays in the western mature tourist regions. TO and TAs are knitting together best holiday vacation for this market. This requires skill and market intelligence in order to establish what the market needs. It is the duty of TO/TAs to make use of their trade competencies and package dream holidays for the bourgeoning middle class in emerging markets. TO and TAs are constantly on the ground engaging the market so that they provide what is exactly needed by the market frustrated by tour holidays offered in the Global North. TO and TAs also remain alive to the need to capture the mature and well-travelled western tourist who seeks new and refreshing exotic tourist destination with authentic attractions for relaxation. Since tourism traffic is now biased towards emerging markets there are exciting opportunities for travel intermediaries to cater for this market.

TO/TAs in emerging regions are shifting away from traditional sales and marketing techniques, and are increasingly using technology and the internet to manage and market their businesses. Granted that TO and TAs have adopted ICTs, emerging markets have been slow to keep pace with the rate of change as compared to their counter parts in the developed world and this threatens the sustainability of their tourism businesses. ICTs enable TO/TAs to compete effectively in an environment unrestrained by borders and barriers, and help TO/TAs access to new and lucrative global markets transcending geographical barriers. Exotic vacation holiday in emerging markets is driven by choice and best marketed by the experiences of tourists communicated via social media. This is a cost effective medium of communication that TO/TAs in emerging markets can leverage on. It has been established that emerging destinations are home to the world`s most vibrant cultures, new and little known attractions and unforgettable experiences. TO/TAs can communicate for the global tour customers. The growth of internet has been one of the most significant and dramatic social, economic and cultural changes that has not spared emerging economic jurisdictions. It has grown to include well over a billion connected users and reached almost every corner of the planet. TO/TAs are responding to tour package holiday users who have now become key board warriors by investing in ICTs.

Internet is quite handy when it comes to travel information search, checking facts or find business contacts. Internet has thus caused major changes to business around the world, causing some methods to become obsolete and others to prosper as technology plays an ever increasing role in everyday life of TO/TAs. Given such a vast audience accessing, sharing and communicating content across the globe, it is no surprise that tourism and time have become increasingly and inextricably connected to the internet. Tourism and the internet perfectly match. The ability to browse, research and compare destinations and attractions on line ideally suits today`s travellers. Tourists would want as much choice as possible, and to be able to compete and research where they will travel. They want to be able to customise their trips as much as possible. With a search engine tourists can quickly research where and how they would like to travel. With internet package tour holiday makers can compare prices, standards, and services with easiness and make more informed choices.

Once a holiday vacation has been decided upon, the ability to effect immediate direct bookings and payments cut out the hassle of email communication, sending and receiving confirmations, and arranging payments. The proliferation of Expedia, and Travelocity and their popularity explains this. TO/TAs have realised that the 21st century youth generation can be best described as the new digital generation that is different to previous generations. This generation has grown with computers and have spent most of their lives connected to the internet. This has made them to think and behave differently to past generations of consumers of packaged tour holiday. This particular youth market generation seeks freedom, customisation of packaged holiday, scrutiny, integrity, collaboration, entertainment, innovation and speed. They have unlimited choice hence expecting them to accept a traditional standardised holiday package, the one size fits all itinerary is a sure way to lose business on the part of TO/TAs.

Customisation: The modern day tourist respond to holiday packages that can be customised. Scrutiny: given the amount of information available on their finger tips, youth tourism market spend much time researching and comparing one TO/TA against their competitors. Modern tourists read reviews and look at content about you that has been produced by other holiday makers. TO/TAs respond by putting on line information that is accurate, informative and supported by content from their customers. Integrity: Since modern tourists are increasingly becoming concerned about the impacts of their travel on the environment and communities of the places they visit, TO/TAs are packaging holidays that are not detrimental to the environment. Travel decisions are made based on this. Collaboration: TOs are wary of the customers who are now able to easily create and post content and talk to them online, customers who are now playing an active role in the marketing of TO/TAs products. This therefore makes packaged tour customers happy and therefore the TO`s most valuable resource. TO/TAs are responding to the favourable content they produce and assist them to spread it far and wide. Innovation-holiday vacations seize on the latest trends, that is, multi-destination trips, so to guarantee success of TO/TAs are taking advantage of such opportunities. Speed- TO/TAs have realised that the age of immediacy is upon us and TOs need to be ready to work in this environment. The above factors are valuable to TOs` success and would form the cornerstones of TOs` future business models given the dynamics characterising emerging markets.

Internet has evolved to become the primary source of information for 95 per cent of travellers globally, and it has become the predominant means of booking and buying travel products. TOs realised that tourists do not always consider price as a sole determining factor to choosing a destination. Conversely, travellers look for holiday vacations that suit their individual needs, interests and tastes. The on line environment is a great place to find the ideal product, the best and not always the cheapest. Unlike a travel brochure listing with a limited set of options, the internet offers virtually unlimited choice, when it comes to travelling, the level of choice means that there is a much more diverse range of products available to an equally diverse range of potential customers. This translates into visibility and access to the right customers for all manner of niche products like active and adventure travel, eco-travel, community based tourism, voluntourism, scuba diving, mountain climbing, bird watching, walking, trekking, historical and cultural tourism, specialist travel for women and disabled travellers. TOs are therefore uploading e-brochures on the internet for easy access by the global tour holiday markets.

While the internet has rapidly revolutionised tourism across the globe, this has not been the case in emerging destinations. Accessing accurate, high quality content and information about destinations has been extremely difficult in emerging markets due to lack of requisite internet infrastructure. This therefore presents a very real and sufficient threat to the sustainability of tour business in these jurisdictions. This is against the background that when one considers the modern generation of connected travellers, the way they use the internet and their buying habits it is clear that if a TO is not visible on line, then they are invisible to the global tour holiday customers. If customers cannot find you on line and are compelled to search at length for information about your services, then you are losing potential revenue. A caveat that TO/TAs need to be mindful is that there is a whole lot of competitors out there ready to take up business away from them and vast majority of them are operating on line. Therefore, to survive and sustain tourism business TO/TAs in emerging markets are investing in ICTs. The traditional way of conducting marketing and sales via traditional channels like magazines, newspapers, on TV or radio, producing glossy brochures and distribute them via snail mail, attending shows and handing out promotional material, signing contracts with TOs to feature on their itineraries, appointing agents to market them and make commissioned sales has become obsolete.

TOs are interrogating these sales and marketing models and ascertain how they resonate with the modern and connected 21st century traveller. Facts on the ground reveal that 67 per cent of people in key travelling demographic never read newspapers, more people now use the internet than watch TV, and there has been a recorded 90 per cent reduction in requests for paper travel brochures in recent years. Modern people use the internet and the amount of information they have at their fingertips is so huge as compared to what they would find at the TA, in a brochure or at trade show or holiday fair market. It is of concern therefore that TO/TAs businesses in emerging economic jurisdictions spend more on traditional marketing media, and sales than they do on their websites, online marketing or social media. On line marketing would definitely raise the TO/TA profile and ideally drive clients directly to their websites or to contact them via social networks. On the contrary if customers cannot actually see availability and make a real time reservation then TOs would lose business.

E-commerce: TO/TAs in emerging economic jurisdictions, as has become the norm in the Global North, are accepting payment online directly from clients. However, in some emerging economic jurisdictions it is not yet possible as local laws and banking infrastructure have not yet been reconfigured to allow this. In such destinations, it is incumbent upon TO/TAs to set up payment solutions and have access to secured and trusted payment gateways to allow clients to pay them directly. TO/TAs are learning about e-commerce, and increasingly use it in their businesses so that they are not disconnected from the way their potential customers live, think and shop. Chances are high that TOs may end up making uninformed decisions on their marketing strategies if there is a disconnect with their clients. The time is now for TOs to commence creating, promoting and sharing content. They are connecting and building relationships on line with customers as the norm of doing business. TOs communicate the best possible content through a variety of channels directly to the best value clients and converting their interest into sales, then keeping them coming back. Tourism is a big business and a highly competitive one. TOs have realised that there are lots of other businesses out there trying to sell to the same people they are targeting. Worse still, they are increasingly doing so on line, so it is easy to find a TO competing with a large number of businesses, offering the same or similar products to the same market. In view of this, TOs are identifying what it is that makes them stand apart from competitors. TOs are identifying the key points of difference about their holiday packages through informed market surveys.

TO/TAs now understand that the common types of tourists who visit emerging markets are experiencers looking for different experiences, explorers who are independent travellers looking to get off the beaten path, entertainers who are travellers looking for a single destination that can provide them with everything they need, engagers-those coming for a specific purpose, and eventers- those attending a specific event. These are tourists tired of the mature western tourist destinations. So they are looking for something new and exciting.

Literature has shown that tourism has become one of the most crucial sectors in a large number of emerging countries, and the tourism industry is projected to keep growing hence is it important for TOs to comprehend the dynamics and prepare to offer holiday packages to the growing tourism demand (Singh, 1997). Szivas and Riley (1999) argued that tourism accounts for the major sources of cash incomes and it has been regarded as a major source of economic growth and employment creation.

Tourism in emerging markets is a major source of economic growth and foreign income (Nowak, *et al*, 2003). In terms of international tourism, products are considered as the location of destination. Considering tourism as a product, rich of nature and uniqueness of a particular destination are the units of interest. Given the above, national protected areas and natural heritages are the important variables to attract international tourists.

Cultural tourism: Cultural tourism is defined as a unique interest tourism based on the search for and participation in new and deep cultural experiences, whether aesthetic, intellectual, emotional or psychological (Stebbins, 1996). McKerecher and Cros (2003) posited that 70 per cent of international tourists look for cultural tourism including unique places when they plan to travel abroad. Emerging economic jurisdictions are uniquely well known for cultural tourism products. This uniqueness refers to a number of natural heritage in a specific country. Most travellers visit destinations that have relatively low cost. The cost of travel depends heavily on a currency exchange rate. Greenwood (2007) argued that currency exchange rate mainly determines the attractiveness of a destination. Security issue is also an important aspect to attract international tourism. After the September 11, 2001 terror attacks, security or safety has been ranked among the top considerations for international tourism (Poon and Low, 2005).

The UNWTO reveals that tourism growth over recent years has largely been driven by emerging economies. Numerous destinations in the emerging and developing regions of the world have managed to fruitfully develop and exploit their tourism potential to attract and cater for visitors from both domestic and international markets. In spite of occasional shocks, international tourist arrivals have shown a virtually uninterrupted growth, 25 million in 1950, 675 million in 2000, 935 million in 2010 and 1.6 billion in 2020. Many new destinations have found their place in the sun alongside the traditional tourism destinations of North America and western Europe. Many emerging economies have been reaping the benefits of tourism to boost their socio-economic development, for example, China, Turkey, Malaysia, Mexico, and Russia. Vibrant economic growth in emerging source markets, coupled with the appropriate proactive policies to develop tourism and ensure substantial investments in infrastructure and marketing in emerging destinations are primary drivers of this impressive performance.

Emerging markets are developing countries experiencing rapid growth and industrialisation. The largest emerging markets are the Brazil, Russia, India, China and South Africa (BRICS). Global tourism is a key driver of growth and development contributing 9 per cent of GDP, 1 in 11 jobs, $1.3 trillion in exports, and 6 per cent of the world`s exports. Emerging markets are characterised by double digit tourism growth, highest growth rates in tourism spend, travel growth is driven off by greater stability, a growing middle class, improved standards of living, and demographic shifts. All these present great opportunities for TO/TAs businesses.

Multi -Destination Trips

This is an emerging phenomenon where holiday package vacationers visit so many destinations during a single trip, for example a visitor from Canada to Southern Africa can visit South Africa`s Table mountain, Kruger national park, move on to experience the Victoria Falls in Zimbabwe and Zambia, view wild game in Hwange and Gonarezhou national parks, visit the dam wall at lake Kariba, go to Botswana to experience wildlife in Chobe and Okavango Delta, proceed to Tanzania`s Serengeti national park, mountain climbing at Mt Kilimanjaro, move to Kenya`s Massai-mara national park all in one trip. This has become the norm rather than an exception and TO/TA in emerging economic jurisdictions are alive to this trend and tailor make holiday packages that cater for such tourist market segment. Regions or countries are warming up to the idea of packaging their tourism offerings along the lines of multi destination concept as a way of getting the most out of their different but complementary tourism resources. Instead of putting emphasis on and marketing a country`s unique tourism products, regions and countries are stressing regional tourism assets, taking advantage of each country`s comparative advantage. TO/TAs seize such golden opportunities and tailor make products to suit the market by coming up with awesome itineraries which fulfils the vacation needs of such specific tourists. The multi destination concept is relatively new in emerging economic jurisdictions hence it needs to be fully exploited. It has immense benefits to the member countries and increase business sales to TO/TAs. By taking advantage of the different tourism resources dotted across different member states TO/TAs can easily come up with tour packages that appeal to the wishes of this growing market segment.

Population Demographics: Ageing vis a vis Youthful Market

Since the end of WW2 profound changes have happened in the global population structure. The increasingly aging population in affluent western tourism markets is increasingly getting in its twilight zones, where empty nests are increasing. This population segment comprises very rich people who are affluent that can afford vacation holiday. This is good news for tourism intermediaries in emerging markets. However, as the global population is greying and maturing, a youthful population demographic is emerging. This population segment is independent, novelty seeking and high risk taking and is entering the tourism market fray. This is a new market segment that has not been seen since the end of WW2 and its implication is that TO/TAs have to re-calibrate their product offering portfolio to take on board the new market. This market can only be ignored at one`s own peril. This is a market that is professional, educated with less commitments, rich but very poor in terms of time. It is a market in search of a fulfilling adventurous holiday vacation of a life time. This market is in sharp contrast to the aged population market segment that is largely conservative, risk averse and prefer to visit familiar tourist destinations. In as far this market is concerned, safety, familiarity and reliance upon tour packages are its hall marks. In sharp contrast, the youthful market is fast paced, technologically savvy, risk taking, eager to experiment and explore the unknown, seek independent travel hence the need for TO/TAs to invest in this market as it represents the future of the tourism industry. TO/TAs in emerging markets are heavily investing in ICTs given that the new youthful market is trendy and technologically abreast. The increasing emerging middle class in the emerging markets is complementing the mature tourism market in the western world. Given the relationship between disposable income and tourism, it implies the demand for tourism holiday packages is set to increase in the foreseeable future. Coupled with high level of education, awareness of tourism benefits, easy access to travel on line, the appetite for exotic vacation is bound to increase. TO/

TAs are revising their marketing and promotional tool boxes and make adjustments that suit the new youthful tourism market. They have not remained stuck in the traditional marketing and promotional avenues that used to appeal to the old generation of tourists. It is therefore imperative that TOs double investment in global distribution system (GDS), Internet, as well as social media so that they remain relevant in the face of the youthful tourism market segment.

Despite the tragedies of September 11, 2001 and the ensuing war on terrorism, the UNWTO, held to its prior prediction that international tourist arrivals would reach 1 billion by 2010, and over 1.56 billion by 2020. Whilst many tourist destinations around the globe compete for high spending tourism markets, the world`s changing population demographics now raises concern in that outbound travel may slow down dramatically in future. The western markets in their population age structure, is growing older at a faster rate. The rapid ageing of the global population has three potential consequences on tour operation businesses: fewer vacations in the future would mean a smaller population pool from which to draw overseas travellers. Secondly, since the number of young people of working age is expected to decline and the number of seniors is expected to increase sharply, the result would be a shrinking workforce and slower economic growth. Finally, the propensity to travel tends to decline with age. An ageing population could potentially temper with the rise in the travel propensity in the future. The implication of an ageing population to TO/TAs is that they have to modify their product offerings to better meet the travel habits and preferences of the emerging cohort of senior travellers possible through joint public-private initiatives to alter holiday and vacation patterns.

The greying of the world society has received widespread media coverage and has been a topical issue of frequent public discussion over the past decade. Under these circumstances it is not surprising that TO/TA firms in the travel and tourism sphere have already began to make concerted efforts to comprehend the scale and quality of the impact of this demographic shift and are developing and implementing fall back responses like coming up with a totally new holiday package exclusively for the senior market segment. From the stand point of TO/TAs who are the tourism industry linchpin, the ageing of the global society /population represents a transformation of the demographic composition of their customer base, and industry attention is focusing beyond the implications of this demographic event on the mature segment of the travel market. It is noteworthy that seniors who constitute the majority of the stock consumer segment of the packaged tour holiday represent a segment of the market that is particularly sensitive about safety concerns abroad. TO/TAs have already designed various ways of capturing a diverse, highly selective and value conscious new senior market by developing products which emphasise on health and wellness. TO/TAs buzzword is to develop holiday packages attuned to the interests and needs of the globe`s senior travellers, for example, creation of travel clubs. The changing demographic profile of the globe create both challenges and opportunities for tourism suppliers and destinations.

It is a fact that an ageing society is no longer on the horizon but it is with us. The growth of the older population raises both opportunities and challenges for policy makers and service providers in terms of the impact that this change might have on the labour market and local economic vitality. However, there is currently very little discussion in tourism development matters about this issue, either in terms of forecasting demographic change and links with tourism product development, or on the appropriate TO/TAs responsive strategies. This write up provides a swift and concise summary of the issues and examines how TO/TAs have responded in the context of emerging economic jurisdictions, to the opportunities and challenges of ageing. It should be pointed out that the global trends in an ageing population are due to two key demographic changes, firstly, there is a generally declining birth rate due to the fact that women are having fewer children than in previous generations, and secondly people are living longer due to improvements in health, diet, preventive care and medical advances. A growth in any section of the population brings with it the emergence of new market. The purchasing power of older people, the 'grey pound' as they are referred to in western tourism markets, would therefore make an increasingly important contribution to the tourism sector. Harnessing this spending would be increasingly important for TO/TAs, exploiting the opportunities of tourism and the subsequent multiplier effect. The increase in the number of older people is also likely to lead to an increase in demand for new technologies in their own homes for longer. As today`s middle aged and internet savvy population move into old age, they would create a growing market for the growth of the tourism industry. Further opportunities of voluntourism necessitated by older people who are a huge source of volunteers and play a role in sustaining a vibrant voluntary and community sector can be expanded. As the population ages, more and more older people may be interested in playing a wider role in voluntourism and it is incumbent upon TO/TAs to tap into this population segment and come up with voluntourism holiday packages, which is a departure from the manner in which they have been operating.

Researchers have consistently shown that seniors would soon become one of the major prospective segments in hospitality and travel industry. Given that this population segment is made up of retirees, they have more time for travelling at any time of the year. They are also the most demanding, expecting excellent and high level security while at the same time report some sort of chronic illness. This implies that TO/TAs product packaging should lean on wellness or biased towards medical tourism. Health focussed holiday packages could be a significant potential for tourism development for this market segment. In addition, the TO/TAs should tailor made medical holiday packages for senior tourists, more focused on wellness and health. Ageing of population in majority of nations with other changes regarding mature population such as socio demographic, health status and travel behavioural patterns are some of the primary reasons for the development of appealing tourist groups that can be referred to as the senior tourists segment, which is nowadays a part of the global tourism and travel industry (Patterson, 2006; Schroder *et al,* 2007; Nimrod *et al,* 2010). The importance of current and future population is that TO/TAs should not only limit tourist offerings to the specifications of the elderly consumers of today but should constantly explore the potential buying patterns and preferences of the future generations in regard to products and services that they would expect and want to buy in the near future while travelling as emphasised by Tongren, (1998); and Littrell *et al,* (2013). Fleischer and Pizam, (2012) posit that travelling increase one`s life expectancy and change daily routine of the elderly. To this effect, seniors mostly travel for relaxation, socialising and meeting new people, visiting new places and enriching experiences

LeSerre *et al* (2013) pointed out that older people are motivated to travel seeking rewards than escapism. This may push travel motivations for elderly which include visiting friends and relatives, health and rest as well as relaxation (Jan and Wu, 2006). This segment of the aged population would increase the overall volume of revenue generated in the tourism sector the most as compared to other target groups since the elderly characteristics include broad travel experience, that makes them more demanding customers, but also allowing tourism demand to shift away from peak periods of the year because they are usually retired with pensions and have leisure time for travelling at every time of the year (Alen *et al,* 2012). The senior market is one of the fastest growing areas of tourism and this trend is evident everywhere. The changing demographics would have a dramatic impact upon tourism in coming decades, impacting on the types of tourists that would travel, where they originate from, where they travel to, the types of accommodation they require and the activities they engage in while away. By 2030 the world population would have grown to 8.3 billion and the growth would not be evenly spread across the globe. Population ageing is a phenomenon occurring across the globe, hence tourists from emerging economic jurisdictions are likely to be younger with very distinctive needs than older tourists from more traditional source markets. This could force a stark choice for tourism destinations in their marketing, communications and product development.

Many pleasure trips are often characterised by the visit of more than a single destination. TO/TAs in emerging markets have to understand and identify the factors affecting the choice of visiting a multi-destination trip. Such factors as physical variables that are related to the destination morphology and logistics, human factors like motivations, socio-economic features and time availability and budget should inform product development. Physical factors which encompass the importance of 'accumulative attractions' in a multi destination trip exert more interest than the case in which each attraction is visited separately in different trips. On human factors independent tourists and organised tourist, the latter tend to be more confined within their 'environmental bubble' as noted by Cohen, (1972), and undertake fixed itineraries. On the contrary, independent tourists explore more deeply the destination and they have more possibilities to change itineraries during their trip. TO/TAs in emerging markets must be up to speed with these perculiarities. The propensity in making multi destination trips is greater for the repeated visitors than for first time visitors (Wang, 2004). Time, has in fact, a strong influence on spatial touristic movements towards and among several destinations (Chavas *et al,* 1989; Walsh, *et al,* 1990; McKean *et al,* 1995). Maria *et al* (2012) bemoaned that multi-destination trip behaviour despite considerable research, is still lacking of empirical applications in the context of emerging markets, in relation to different geographical contexts hence this write up is an attempt to address this.

Five motives that travellers may have for visiting more than one destination per trip could be to satisfy the heterogeneity of preferences present in their travel party, to visit friends and family, to find variety, to reduce the risk of being dissatisfied with the vacation, and to increase travel efficiency by visiting many destinations that interest them during one trip (Leu *et al,* 1993). Wall (1979:35) posited that "Recreation sites do not exist in isolation. They are found within a context of competing and complementary factors. Given the mobility of the most pleasure travellers it is likely that they will frequent more than one site or destination on a single trip". TO/TAs in emerging markets should have such market intelligence data that provide insight into the piercing together of a multi-destination trip or vacation. Leiper (1989:531) observed back then that '...not much information is readily available about patterns of multi-destination tourism". A potential tourist is likely to view multi-destination visits as a rational behaviour pattern that reduces the time and cost associated with travel (Ben-Akina and Lermam, 1985), and therefore increases the potential benefits that may accrue. There are at least five reasons that may account for people engaging in multi-destination trips. First, pleasure travel comprises relatively complex patterns of interdependent travel activities (Fesenmairer and Lieber, 1985). Even with a tour group as small as two people or a single family, different members are likely to seek different benefits from destinations on a vacation. This heterogeneity of preferences encourages selection of multiple destinations and single destinations with multiple attractions, since different destinations and attractions may be able to fulfil the different needs of each member of a tour group. Secondly, Mill and Morrison, (1985) revealed that most tourists stay in the homes of friends and relatives when taking a trip, regardless of the purpose of the trip. Therefore, temporary stop over at homes of friends and relatives may increase the tendency to visit more destinations on a trip. Thirdly, as the benefits sought expand from single to multiple, the resultant diversification travel pattern may be attributable to the need to seek variety (Faquhar and Row, 1976). In addition, by aggregating a group of attractions into a trip, rather than relying on a single destination to provide the benefits sought, individuals may perceive that they reduce uncertainty and level risk.

Environmentalism-cum-Sustainable Tourism

At the earliest stage of development, the evolution of the tourism sector was influenced by the advocacy perspective in which tourism development pundits argued that tourism was a panacea to challenges facing most economies through creation of employment, generating foreign currency, contribution to GDP, spurring infrastructural development, and creating social amenities. Little did the advocacy construct took into account the possible harmful or injurious effects of tourism on the environment upon which it depends. As time went by negative effects of tourism began to be felt through degradation of the environment as a result of an increasing number of tourists which in most cases exceeded the destination`s carrying capacity. Resultantly, a new paradigm emerged and was framed as the cautionary approach where the issue of sustainable tourism or responsible tourism took centre stage. World leaders and advocacy groups convened conventions and high profile meetings were convened aimed at deliberating and charting the way forward, cautioning that unbridled tourism development was far much more harmful to the environment and the economy in the long run as opposed to short term quick gains. The Agenda 21 summit held in Rio De Janeiro laid the basis upon which sustainable tourism was framed. Powerful environmental lobby groups came on board advocating for stiffer penalties on tourism operators who disregarded the sanctity of the environment for profit expediency. There was urgent need to protect the environment so that future generations could also benefit from the same tourism resources. Environmentalism became a marketing gimmick by tourism operators as they sought to accommodate lobbyists. Eco-labels, and green certification are increasingly becoming the order of the day for TO/TAs as they seek to be in tune with environmental protection lobby groups. Never before has it become an issue to protect the environment than in the 21st century. TO/TAs in their product offerings are making sure that they are environmentally friendly. Tourism activities are complementing the environment, they provide education to tourists to preserve the environment, and not do anything harmful to the environment, TO/TAs are promoting and marketing vacation holidays that are eco-friendly, and environmentally sensitive. The type of tourists or clients that they serve are acclimatised to the need to protect the environment. Ironically, a tourist market segment which only visit tourist destinations that are environmentally friendly is emerging. This market segment only do business with TO/TAs that are sensitive to the environment. The growing environmentalism movement or consciousness is forcing TO/TAs to also adjust their product offerings infusing environmentally eco-friendly labels. Without the environment, there are no packaged tour holidays to talk about. Environmental protection radical lobbyists are proffering an argument that the mature western tourist destinations` natural environment and aesthetic appeal were destroyed by touristic activities hence tourists are trooping to emerging markets to similarly destroy the natural appeal of the environment. However, this allegation has not yet been empirically proven. Kenya in East Africa is one tourist destination whose tourism sector made headline news booming in the early 1980s. However, due to poor planning and control its growth sprawled out of control and in no time the industry destroyed itself. The huge influx of visitors destroyed the environment to an extent that to date Kenya`s tourism sector has become a shadow of its former glory. The world`s key tourism resources like the Great Wall of China, Victoria Falls, Great Zimbabwe monuments, Eiffel Towers, Yellowstone national park, Mt Kilimanjaro, Mt Everest, The Himalayas, and Egyptian pyramids to mention but a few are what they are today because of the environmental protection mechanism put in place to preserve such iconic attractions. The coming on board of world bodies like UNESCO declaring such tourist attractions as global heritage sites is ostensibly to preserve such resources for the benefit of future generations. In keeping with the spirit and letter of environmentalism TO/TAs in emerging markets are adjusting their packages to reflect these global changes, trends and concerns.

The term sustainable development in the last part of the 20th century became widely used by governments, NGOs, the private sector and academia. The concept has been applied in the tourism sector in various ways of which the ensuing definition was coined: meeting the needs of present tourists and hosts while protecting and enhancing opportunities for the future. Sustainability in tourism means regulating the use of tourism resources so that they are not consumed, depleted or polluted in such a way as to be unavailable for use by future generations of tourists. As the public has become aware of the extent of human impact on natural system, environmental issues are increasingly gaining more ascendancy, concern is also growing about the physical environments of destinations used for tourism. The reliance of the tourism phenomenon upon the natural finite resources of the environment and the fact that development includes changes which can be negative are increasingly being realised. The heightened awareness of harmful effects of tourism on the environment came upon the realisation that development and environment are inexorably linked. Sustainability has become a focal point of interest particularly in areas which in the future will become more popular destinations and as such the increasing number of visitors will result in more serious environmental impacts. The development and expansion of the tourism sector requires physical resources to facilitate its growth. Therefore the protection of the natural resources upon which tourism is based is essential for the sustainable development of a location. The need to preserve the world`s inherent assets for future generations is becoming an essential goal not only for the travel and tourism sector but also for all other industries that use the earth`s natural resources. Tourism as one of the world`s fastest growing industries, has a multitude of negative impacts on the environment. Negative impacts will arise when the level of visitor use is superior to the environment`s ability to cope with its use. TO/TAs have increased level of awareness that tourism is an environmentally dependent activity. Theobald (1998:20)`s summation is instructive: "The physical environment is the key element of tourism". Uncontrolled conventional tourism poses potential threats to many natural areas around the world. It can put enormous pressure on an area and lead to soil erosion, pollution, discharges into the sea, natural habitat, and pressure on endangered species.

In view of the foregoing TOs in emerging markets always seek harmony between the needs of the visitor, the place and the host community. It has become crystally clear to TOs that the development of the tourism industry would inevitably have negative environmental consequences, and if they are not properly managed they may destroy the physical environment and natural attractions (Holden, 2000:126).

A key lesson learnt by TOs in emerging markets from environmental economics is that the environment cannot be perceived as separate entity from the other resources. Most human activity affect it and in turn changes in its state has economic repercussions. It is therefore prudent that economic decisions take into account the welfare of the future generations. Packaged tour holidays are wholly dependent upon the environment, natural resources, beaches, seas, mountains, lakes, rivers and manmade resources like historic cities, heritage buildings and sites, monuments constitute the primary source of tourism. Any degradation of the primary resources is likely to lead to a decline of tourism. The essence of sustainable development is to manage world economies in such a way that the present needs should be met without impairing the capacity to meet the future needs. The rate of depletion and possible exhaustion of key productive resources remain a central economic problem. TO/TAs should be environmentally friendly in their holiday vacation packaging.

Harnessing ICTs, CRS, GDS, and E-Commerce

The 21st Century is rightly referred to as the digital era in parlance where everything is ICT driven. E-commerce has redefined the way people do business every day. ICTs, GDS, and central reservation systems (CRS) have become buzz words. Prospective tourists or vacation customers can easily access information relating to package tour holiday products easily through a click of a mouse button. The implication on TOs in emerging markets is that the traditional distribution channel of tourism products is being challenged and shaken to the core. Pessimists even suggested that the GDS, ICTs, and CRS were the death nail on TO/TAs` role in the tourism value chain. However, far from it TOs are harnessing them as allies to capture the tourism market that is technologically savvy. The tour sector has been among the first to capitalise on new technology on account of it being an information rich that depends on finding and developing new means to distribute tourism products, marketing information to customers and providing convenience to travellers. The tourism sector is one of the earliest to go on line. TAs using CRS provided leisure and business travellers with one stop shopping guidance and pricing and schedule advice to make reservations, issue tickets and provide ancillary services like currency conversion. The use of the internet by travellers to plan and book their trips continue to grow at a rapid rate. Travel Industry Association (TIA, 2006) reported that more than 75 million online travellers used the internet to get information on destinations and to check prices and schedules. A majority of online travel planners use destination websites in addition to using online travel agency websites such as Microsoft Expedia, Travelocity or Priceline, and other search engine websites.

Tourism incorporates many features of the information society such as globalisation, mobility and information richness. The world wide web is profoundly changing the production, distribution and consumption of touristic products. TOs can be seen as product aggregators, who produce a new product by combining basic products or components. TAs on the other side can be viewed as information brokers, providing the consumer with the relevant information and booking facilities. More importantly and particularly more dangerous for the TAs is the emergence of the so-called online booking servers. These are acting as a kind of virtual TAs or even travel supermarkets providing booking facilities for air, hotel, car rental or holiday packages as well as many additional information retrieval services. With respect to the tourism value chain they can be regarded as new intermediaries, setting up an additional distribution link from the CRS/GDS to the consumer, bypassing TAs. TOs have to adapt to the environment punctuated by blogs, world- wide- webs and maintain their presence on line.

Human Resource Training and Development

Conventional tourism literature has documented that despite the tourism sector being high tech it needs a human touch. Critical in service delivery is the human resource factor. Given the ever changing needs and tastes of customers, TO/TAs invest heavily in HR training and development so that they have the cutting edge skills and competencies to serve a diverse tourism market base. The ICTs revolution dictates that HR must be trained and remain relevant in the industry. Training in the latest technologies, software packages, computer reservation systems, and global distribution systems is a must. Cutting edge HR that provide flawless service during encounters with customers should be the philosophy. TO/TAs have realised that the most important asset are their employees. Staff are part of the holiday vacation therefore employees should be skilled in product delivery, and well conversant with tour packaging, costing and tour guiding. Tour guiding training is a pre-requisite given the shifts in tourism markets highlighted earlier on, shift from an ageing population to a youthful population, and habits of a youthful tourism market. TO/TAs are taking on board these changes. In addition, TOs are emphasising on language and sign language training. Due attention is given to accessible tourism to cater for the physically challenged tourism market segment. As of yesterday the disabled market was not really a factor in packaged tour vacations but given the increasing significance of this market TO/TAs are taking practical steps to accommodate or integrate this market segment. TOs/TAs` overarching point is to make sure that their product offerings are accessible to all tourism market segments without appearing to be discriminative. This is in keeping with calls from human rights groups advocating for accessible and inclusive tourism. The same can be said on international tourism organisations like the UNWTO and WTTC who have added their voices on tourism operators to make sure that they also cater for the long neglected but growing disabled tourism market segment. Countries are also enacting laws making it mandatory for tourism operators to make provision for accessible tourism particularly the disabled market segment. TO/TAs in emerging markets are complying with such legislation as a way of avoiding lawsuits or suffer a back lash from customers through products boycott. Holiday vacation is all about interaction between the tourist and the frontline service employee hence it is critical that TOs have the right skills to delight the customers. Investment in HR training and development is not an option for TO/TAs. TOs staff should able to converse in a diverse range of languages to reflect the diversity of packaged tour holiday clientele base.

The tourism product is based on social interaction between the supplier and the consumer, where the quality of the product is mainly defined by interaction. To this effect, the tour sector`s success depends on several factors, the most important of which is human resources. TOs are constantly developing employees` capacity and improving their motivation to guarantee quality service delivery to customers. The tour sector directly depends on people, their ideas, working behaviour and communication with potential customers or tourists. TOs employees generate capital for the organisation they work for, through using their competencies, attitudes and intellectual agility. Competencies as a component of human capital according to Milicevic (2002) entail knowledge, skills, talents and know how that the employees and managers have. The uniqueness of the tourism product and role of employees in the creation and delivery of the packaged tour holiday requires modification of the traditional 4P marketing mix into a new formula 4P which includes people skills, and processes initiated by a customer: excellent people skills, superior product, impressive presentation and customer driven processes. Given the internationalisation of the tour package holiday business, all levels of management would need constant training particularly in interpersonal and multi lingual skills. Environmental awareness and conservation techniques should become an essential part of tourism education at all levels in the 21st century.

TO/TAs Product Development and Marketing

Emerging economic jurisdictions still boast of virgin tourism spaces as their unique selling point (USP). Since end of WW2 there has been political, social and demographic recalibrations, and tremendous strides in education, and emancipation of women. These changes have spurred package tour holiday growth and development. There has been fundamentally changes in the broad travel and tourism industry since WW2, punctuated by population demographic shift, access to education and ICTs revolution. Consequently, little is known about the holiday and vacation preferences of the new youthful population, and how TO/TAs are responding to these market dynamics. The tastes and tourism choices of these emerging groups are little understood. TO/TAs are adapting correspondingly in terms of segmentation and positioning strategy to capture and integrate the emerging tourist market into the main stream tourism industry. With the increasing size and purchasing power of the new generation market, that has a growing proportion of young people, it is timely to analyse the tastes, preferences and vacation behaviour of this new breed of potential vacationers. There is paucity of information in the aspect of TOs product development given the emancipation of women, increased dual family income etc.

These market dynamics may mean a change to the pre-existing ways of operating package tour holiday. TO/TAs in emerging markets have seized on the market dynamics as an opportunity to restructure, identifying new market segment, and explore new avenues to shore up revenue streams. Turbulent changes in the tourism value chain create conditions for intensive activities. On line agencies that have emerged eat into the traditional TO/TAs market, hence cutting their profit margins.

A destination management company is a professional management company specialising in the design and delivery of tours, events, local transportation and other different activities based on local knowledge and expertise (Vesna Spasic and Danijel Pavlovic, 2015). Therefore, tourists have shown a high level of trust towards agencies with the destination that have precise knowledge and information about the resources and the overall situation within the destination. TOs alternatively referred to as tour wholesalers make a packaged tour and its components and sells the ready-made tour package either through its own company or via retail outlets and approved retail travel agents. Such ready-made vacation packages offered to tourists ordinarily have a lower inclusive price, that is, transportation services, accommodation, and excursions which are bought in bulk. TAs is largely a middleman, whose profit is realised through a commission from the principal suppliers, that is, TOs. In the tourism value chain, the TA is acting on behalf of the client and represents a connecting link between the client and the suppliers of travel products like hotels, airlines, TOs and cruise ships. Being an expert or technocrat in the tourism field is one of the key tenet of a TA, particularly in the contemporary global environment that is characterised by rapid changes. The proliferation of the so-called on line travel agencies (OTAs) and ICTs is threatening the existence of traditional TAs.

The broad travel and tourism sector is responding timeously to the changes on tourist behaviour. Along with the technological progress, some previous clients of the TAs may opt to circumvent intermediaries, start own bookings and purchase tourism services directly from the principal suppliers like airlines, hotels, and cruise ships. As a means to survive in such a fast paced technologically changing environment, TO/TAs are adjusting, diversifying and consider new alternative revenue streams other than basic commissions. They levy service fees, offer unique and customised vacation trips, maintain online presence or visibility and develop promotion of the services via social media as a way of survival.

Given the *raplex* and explosion of ITCs, tourists now have a wide variety of media to use when making reservations. Due to the unprecedented development of e-commerce, tourists can either go to a TA or can get an online search. The perceived and documented tourist benefits of tourists of using a traditional TA encapsulates the fact that TAs are renowned and tested professionals in the tourism industry and they are up to speed with different alternatives which provide a fair and lower fare to the customer. Given their experience TAs have unfettered access to the CRS for effective vacation search of splendid touristic vacation experiences. This way, the increasingly time poor tourists, eventually save in terms of time. TAs can divide the market into smaller segments with distinct needs, characteristics and behaviour that may require separate marketing strategies or mixes. TAs can easily segment a market given their thorough grounding in geographic, demographic, tourist behavioural and psychological variables. This is one of the TO/TAs strength despite the proliferation of ICTs. The principal idea for TAs is to keep the process of the constant development in order to stay dynamic on the market (Kotler and Armstrong, 2001: 273). TO/TAs constantly monitor the situation on the market taking into account customers` reviews.

E-commerce entails the selling of goods and services via the internet. Given the pace at which e-commerce has revolutionised trade and commerce, having a presence on the internet has increasingly become essential for business that want to compete successfully. In fact, e-commerce has been embraced by TOs as an ally in the contemporary tour operation sector. TO/TAs in emerging markets are using internet as a distribution medium to deal directly with customers, connecting with customers, thus threatening to elbowing intermediaries along the way. Not discounting the many benefits brought about by internet or e-commerce to trade and industry, it has its own inherent weaknesses. While internet is credited for being a great tool to search information through the click of a mouse button, it ominously produces a huge amount of information that may lead to a tourist`s loss of interest or just being put off. This means that TO/TAs are indispensable as they can easily streamline the information.

TO/TAs therefore keep travel and tourism related information up to date, on the internet visible and clear. Tourists value credibility and security of the internet site used by TO/TAs. TOs leverage on word of mouth (WOM) in which after a successful and funny filled vacation vacationers are inclined to share their experiences with their own circle of people, family, work associates, friends. To this effect, TO/TAs promote memorable holiday experiences, so that customers can do the marketing on their behalf. Such a mechanism, in marketing lexicon is called ‘viral marketing’, that is, creation of information content attached to the brand and interactive applications that users distribute themselves among their own environment. The principal objective for the TO/TAs is to comprehend the interests of the audience, and behavioural motives that induce users to information sharing on this basis to create viral content. Today social networks are used not only for entertainment or communication but also for the business environment. TO/TAs are therefore adapting to the changing market place and offer unique services which are valuable to customers. Today`s tourism market environment has become very competitive, customers have many different choices. In order for TO/TAs to survive they need to be proactive and embrace ICTs revolution at the same time continuously being innovative on product development, armed with market intelligence.

CONCLUSION AND RECOMMENDATIONS

TOs in emerging markets have been proactive through the adoption of a new set of ethos in the face of tourism market place dynamics. The fundamental changes characterising the global tour sector presented exciting opportunities that TOs have leveraged upon by revising their product offerings. To thrive and remain relevant in the tourism value chain, TO/TAs need to offer value for money, invest in HR training, and tailor made tour holiday packages that resonate with the new tourism market demographics.

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KEY TERMS AND DEFINITIONS

Corporate Social Responsibility (CSR): Entail a business approach that contributes to sustainable development by delivering economic, social and environmental benefits for all stakeholders.

Emerging Economic Jurisdictions: Also known as simply emerging markets. These are largely developing countries whose economies are at the intermediate stage of development. They are investing more in productive capacity, they are therefore rapidly industrializing through adoption of free market or mixed economy as a way of creating a better quality of life.

Global Distribution Systems (GDS): This is an acronym of global distribution system that entails a large computer network, cum a reservation toll that passes hotel inventory and rates to travel agents and allows them to make bookings in real time. The three traditional GDS are Amadeus, Galileo, and Worldspan.

Global North: Refers to countries with the highest level of development, highest level of industrialization and mature democracies. These nations are highly industrialized, have political and economic stability and have high levels of human health.

Global South: A term referring to less developed countries characterized by low level of economic development, large inequalities in living standards and low life expectancy. Loosely entails poor southern countries that are frantically seeking to transform their economies.

Information and Communication Technologies (ICTs): This refers to a combination of information technology that emphasizes the role of unified communications and integration of telecommunications, computer terminals, software, storage and audio-visual systems that enable users to access, store, transmit and manipulate information.

Tour Operator (TO): A key player in the distribution channel of tourism products, whose principal duty is to synthesize tourism and travel elements like accommodation, transport, food, drink, and excursions to create a package holiday for a single price.

Tour Operation Industry: This is an economic sector concerned with provision of vacation products to the general public. The industry focuses on tourist source regions, transit regions, and destination regions. The sector is dominated by tour operators, travel agencies, national tourism organizations, and other transnational tourism-related organizations.

Travel Agency (TA): A retailer in the distribution channel of tourism products who provides tourism and travel related information to customers, selling tourism products to customers on behalf of TOs in return for a commission.

Word of Mouth (WOM): This is free advertising which is triggered by customers` experiences. When a vacationer has a wonderful tour experience because their expectations were exceeded and later on tell tweets about it.

Chapter 11
Perception of Inbound Tour Operators of India Towards Marketing Strategies of Ministry of Tourism

S. S. Boora
Kurukshetra University, India

Kusum
GNA University, India

Megha Gupta
Kurukshetra University, India

ABSTRACT

With the increase in travel frequency at global level, destinations compete with each other to attract tourists. The tourists have a vast array of destinations to choose from. The destinations compete at global as well as regional level. These developments in tourism bring forth the importance of marketing for a destination. The destination marketing is generally undertaken by destination marketing organizations (DMOs) which operate at national, regional as well as local level in a country. In context of India, MOT (Ministry of Tourism, Government of India) undertakes the role of a DMO and is responsible for formulation and implementation of marketing strategies to promote India as a destination at global level. Further, it is imperative to understand the perception of other stakeholder about the marketing strategies of MOT in order to recognize the effectiveness of its marketing efforts. Being co-creator of destination image, inbound tour operators are considered as the key stakeholders at the destination. The objective of this chapter is to understand the perception Indian inbound tour operators towards the marketing strategies carried out by MOT. The data for the study was collected through structured questionnaire. The findings of the study indicated that inbound tour operators perceived marketing plans adopted by Ministry of tourism were effective to position India as a tourist destination at global level. At planning stage of strategy making for promoting India as tourist destination, MOT does not seek the opinion of inbound tour operators. It is suggested that MOT should involve inbound tour operators for drawing the marketing strategies for India as they are key seller for the tourism product.

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INTRODUCTION

In the present global competitive environment, destinations have major challenge to maintain their competitiveness in long term and DMOs should play a crucial role to augment the destination image and service quality in the target market (Pike, 2004) and Minguzzi & Presenza, 2004). The necessity of coordinated efforts for the planning, development and marketing of tourism were considered as the prime factors for DMOs existence (Morrison, 2013). Some countries have established ministry of tourism which performs the entire DMO role and does not use the term NTA. In context of India, MOT is the nodal agency under the Government of India, which is responsible for the formulation of policies at national level, for the co-ordination among different stakeholders and for promotion of tourism in India (Sheehan & Ritchie 2005). There is intensive competition between the world destinations with respect to greater market share; where places are encouraged to think and plan more business-like (Kotler, Haider& Rein, 1993). A destination is instrumental in creating the total vacation experience for the tourist (Uysal, Harrill&Woo, 2011). Destination form the basic element of tourism system as most of the tourism activities takes place there. WTO, 2002 (cited in Pike & Page, 2014) termed destinations as "the fundamental unit of analysis in tourism". Pike (2004) described destination as a place or "purpose build area" at which visitors base themselves on temporarily basis and involve in tourism related activities. Howie (2003) considered destinations as multifarious phenomena to manage. But greater intensity of competition between destinations (Ashworth &Goodall, 1988) has changed the destination dynamics that has facilitated the marketing of destinations into an increasingly organized, specialized and professionalized industry (Gotham 2002). Destination marketing is an overall effort to identify what it is a destination has to offer (the product), what groups of people would have the time, money and desire both to travel to and to enjoy the destination (the target markets), and how best to reach and convince those people to come to the destination marketing (Lundberg 1990). Destination marketing should be effective enough to satisfy the needs of all stakeholders as well as different market segments.Most of the activities associated with destination marketing are promotional activities (Cai, 2002).

Wahab, Crampon&Rothfield (1976) presented commonly quoted definitions of destination marketing in the 1970s. They defined destination marketing as 'the management process through which the National Tourists Organizations and/or tourist enterprises identify their selected tourists, actual and potential, communicate with them to ascertain and influence their wishes, needs, motivations, likes and dislikes, on local, regional, national and international levels and to formulate and adapt their tourist products accordingly in view of achieving optimal tourist's satisfaction thereby fulfilling their objectives'.In some countries these National Tourists Organizations (NTOs) are termed as DMOs or NTAs at national level, who are responsible for the marketing and management of tourism at a national level (Sheehan&Ritchie 2005).Pike (2004) defined destination marketing organisations (DMO) as "any organisation, at any level, which is responsible for the marketing of an identifiable destination" (p. 14).

Destination marketing involves a substantial range of different stakeholders to deliver the tourist product (Heath and Wall, 1992; Kastenholz, 2006). Each stakeholder has different objectives and approaches. For the success of destination marketing every single stakeholder have important role to play, however it is challenging to manage this process (Palmer and Bejou 1995; Buhalis 2000; Wang 2008). Stakeholders are defined as "any group or individual who can affect or is affected by the achievement of the organisation's objectives" (Freeman, 1984, p.48 cited in Al Alwi, 2015).Many researchers have highlighted the role of DMOs towards stakeholders in literature. Bhualis (2000) and Sheehan & Ritchie (2005) stated that DMOs should understand the stakeholders and act as facilitators to assist them in attaining their goals. L. Slocum& Everett (2014) asserted that DMOs acts as mediators in varying interest of stakeholders of the destination thus act as binding thread between destinations and tourism market. It is important for DMOs to assure the loyalty and commitment of stakeholders towards the branding and communication strategies of the destination (Sartori, Mottironi, &Corigliano, 2012).

There are medleys of stakeholders in context of tourism and can be categorized as: government bodies, tourist and hospitality firms (tourism attractions, travel agencies, airlines, hotels, restaurants etc.), tourists and local community (Sheehan & Ritchie, 2005 and Timur& Getz, 2008).In order to ascertain the focus of DMO's efforts, Sheehan & Ritchie (2005) categorized the different stakeholders as primary and secondary stakeholder.Destination marketing and services provided at the destination are broadly impacted by tour operators and travel agencies. Further, Lawton & Page (1997) and del Bosque, Martin &Collado (2005) professed that tour operators and travel agents act as opinion leaders for tourists during the purchase of travel package because of their understanding about destinations and services offered. Thus, they play a dual role of distribution channel as well as image creator for a destination.

In the present paper, perception of inbound tour operators is analysed towards the marketing efforts of MOT (DMO in context of India) for inbound tourism in India. Inbound tour operators are selected as they are the one, primarily responsible for handling the foreign tourists coming to India and making arrangements for them such as transfers, transportation, accommodation, entertainment, sightseeing, shopping, currency, documentation, insurance services etc. They often collaborate with foreign tour operators. They are valuable contributors towards the foreign exchange earnings for India.

REVIEW OF LITERATURE

It has been accepted by many scholars that due to multifaceted nature of tourist destination, it is difficult to successfully govern destination marketing (Fyall and Leask, 2006).In an increasingly globalized and competitive market for sustainable tourists, destination marketing is acknowledged as a pillar of the present and future growth of tourism destinations (UNWTO, 2011). Traditionally, destination marketing had orientation towards the promotional aspect (Baker & Cameron, 2008; Ritchie & Ritchie, 2002, Buhalis, 2000; Ritchie & Crouch, 2005; Ryan, 1991) and towards advertising more specifically (Prentice & Andersen, 2007).Fyall, Garrod&Tosun (2006), proposed a 15 Cs Framework encapsulating the main challenges of destination marketing. The 15 Cs are Complexity, Complacency, Competition, Communication, Control, Collaboration, Customers, Creativity, Cyberspace, Change, Crisis, Culture, Commodification, Channels, and Consolidation.Wang & Xiang (2007) suggested collaborative marketing efforts as solutions to destination marketers where destinations bank upon tourism for economic development.Wang (2008) also emphasized the significance of collective efforts for destination marketing. He pointed out that the issue of collaboration has been premeditated from different perspectives; however collaboration for marketing at the destination level has attracted very little attention in the literature. Lichrou, O'Malley, & Patterson (2008) in their study evaluated the challenges and incongruity encountered by the marketing of the destination by using the narrative approach and highlighted the innate weaknesses of the traditional marketing to appropriately address the issues. Baker & Cameroon (2008) observed that globalization has led to increase competitiveness amongst different stakeholders to retain their share and increase in the global pie. Bornhorst, Ritchie, & Sheehan (2010) while investigating the concept of destination success in relation to destination and DMO in Canadian context, asserted that marketing and promotion research of destination should emphasis on three aspects namely: collaborative destination marketing; effectiveness and usefulness of promotional and advertising efforts and on measurement and management of image of the destination in the tourist market.

Poetschke (1995) stated that for a destination to stand apart in the crowd of destinations, promotional activities of all the stakeholders at the destination should be consistent, innovative (should not send the conflicting messages), repetitive and should have reach to the target market. Further, to achieve this goal, stakeholders should collaborate and pool their resources together to promote destination in the target market.Faulkner (1997) stated that evaluation of marketing activities of NTO should be subjected to more strenuous and comprehensive approaches which would equip the organization with strong foundation for strategic decision making. Buhalis (2000) suggested planning and marketing of the destination as the prime responsibility of the DMO as they have necessary resources to achieve the strategic marketing objectives of the destination. Terzibasoglu (2004) attributed role of marketing and promotion (strategic marketing, image organization, positioning and branding) along with additional activities like quality issues, research and information activities as primary role of DMOs at the destination.Middleton & Clarke (2012) suggested additional roles of DMOs like collection of research data, marketing intelligence, setting up office in tourist generating markets, production of promotional material like brochures, leaflet and trade manuals, organization of trade shows and workshops, taking part in joint marketing activities, protecting and supporting the tourists at the destination, and providing advice to the industry.

Volgger & Pechlaner (2014) proclaimed that in relation to DMOs being seen as collaborators among stakeholders for destination competitiveness, the DMOs are conceptualized as network managers in today's scenario. Further, many researchers (Buhalis & Cooper 1998; Fyall & Garrod 2005; Henderson 2001; Palmer & Bejou 1995; Prideaux & Cooper 2002; Saxena 2005) have admitted that involvement of both public and private sector in production as well as promotion of tourism is beneficial for marketing the destinations in tourist generating markets.

Morgan, Pritchard, & Piggott (2003) proclaimed that DMOs should improve internal and external communication with stakeholders by developing a global corporate database, by organizing road-shows and presentations with industry sectors, communicate the activities that are in line with the IT and communications strategy of organization, broadening the scope and depth of website related with the tourism trade, and developing an intranet within the tourism website. Kokkranikal, Cronje & Butler (2011) proclaimed that DMOs, tour operator and tourism marketing agencies mainly do destination image and marketing. These agencies in fact play a key role in creating a destination's image and thus influencing clients' decision-making and behavior. Sartori et al. (2012) found out that although literature advocates the stakeholders would be ready to integrate the brand values of the destination in their business activities an inclusive and participative approach to the branding process is adopted by DMOs. However studies on internal brand equity creation through involvement strategies have been paid little attention. Chung & Petrick (2013) argued in order to enhance the competitiveness of the destination; DMOs should improve their associations with the stakeholders.

Epp (2013) stated that tourism industry is very vast and involves number of stakeholders, therefore marketing and promotion of destination is generally managed by DMO. Selin & Myers (1998) observed that despite the increasing collaboration between public and private sector and managerial and academic concern in such alliances, this area lacks systematic research.

Thus, the above review of work of both academic as well as industry make it clear that Tour Operators are one of the important stake holders for tourism industry They play an important role to boost tourism in a country. MOT also contributes significantly in promoting India as destination at global level. But MOT is not involved in direct selling of the product. Both the stakeholders play an important role in the growth of tourism industry. The analysis of literature clearly reveals tour operators get affected with the marketing policies of MOT. So it becomes imperative to understand the perception of tour operators regarding the effectiveness of marketing strategies for promotion India as tourist destination at global level. And secondly whether MOT involve inbound tour operators during the planning stage of marketing strategy formation for India as destination. Thus, with this background this study aimed to fulfill following research objective and hypotheses.

The objective of the paper is to find out the perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT for destination India. For this objective H1 was formulated, i.e. perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by Ministry of Tourism (MOT) for India as destination

RESEARCH METHODOLOGY

With an aim to understand the view point of tour operators regarding the marketing efforts of MOT to promote India as a destination at the global level, quantitative approach was used. The opinion of the respondents was measured through self-administered questionnaire. The questionnaire consisted of variables related with marketing efforts of MOT. The structured questionnaire was used which was logically arranged with adequate number of closed ended questionnaire. The questionnaire consisted of two parts. Section A of the questionnaire contained questions related to marketing efforts undertaken by MOT. Section B of the questionnaire consisted questions related to demographic profile of the inbound tour operators. The data was collected from inbound tour operators approved by MOT and have been measured on the instrument called Likert's scale. Likert-scale is one of the most widely employed forms of attitude measurement in survey research (Brill, 2008). The scale was presented both as verbal description as well as in numbers i.e Strongly Agree (5), Agree (4), Neutral (3), Disagree (2) and Strongly Disagree (1). Questionnaire was addressed to the top-level management of the company. For the present paper convenience sampling method is used. The data has been analyzed with the help of various statistical techniques to extract meaningful inferences.

RESULTS AND DISCUSSIONS

Demographic Profile of Inbound Tour Operators

As per the data of Travel Trade Department of Ministry of Tourism (2017), Govt. of India total number of MOT approved inbound tour operators in India are 433 Out of which 214 tour operators participated in the survey. To carry out the study, a structured questionnaire was formulated based on comprehensive review of literature. In the questionnaire, senior management employee or owner of the company were asked to reflect their opinion on statements in relation to marketing efforts of MOT to promote India as Tourist Destination at global Level. A Likert-type scale (from 1: strongly disagree to 5: strongly agree) was used for this purpose. The data are analyzed with the statistical package programme for social sciences (IBM SPSS 20 for Windows).

Table 1 presented the demographic profile of the respondent inbound tour operators. Out of total 214 respondent tour operators, maximum (100 i.e. 46.7 per cent) were located in New Delhi followed by 24 (11.2 per cent) in Haryana. Most of the respondent tour operators (76 i.e. 35.5 per cent) were in business for more than 21 years. While 27 tour operators (12.6 per cent) were new entrants being in travel business for less than five years. In term of number of employees data revealed that maximum number of respondent tour operators (160 i.e. 74.8 per cent) were having 50 or less employees working in their organization, only 12 respondent tour operators (5.6 per cent) were found having above 201 employees. Micro, Small, Medium Enterprise Development (MSMED) Act 2006 defined the size of Tour Company on the basis of capital invested. On the basis of above criteria, maximum number of respondent tour operators (93 i.e. 43.5%) were found as small companies with the capital of more than Rs.10 lakh but less than or equal to Rs.2 crores, while 49 respondents tour operators (22.9 per cent) fall under the definition of large companies as capital invested was above Rs.5 crores.

Further, on the query related with total number of inbound tourists handled by tour operators in the last year, data revealed that 104 (48.6 per cent) tour operators had handled above 351 inbound tourists in the last year whereas only 7 (3.3 per cent) respondent tour operators catered 51-100 inbound tourists during the last year. Maximum number of respondent tour operators (150 i.e. 7.1 per cent) were found catering to leisure market whereas only 9 (4.2 per cent) respondent tour operators targeted adventure market.

Table 1. Demographic profile of inbound tour operators

N= 214	Number	Per cent
Location		
Andman And Nicobar	1	0.5
Assam	3	1.4
Bihar	2	0.9
Chandigarh	1	0.5
Goa	2	0.9
Gujarat	2	0.9
Haryana	24	11.2
Jammu and Kashmir	1	0.5
Karnataka	6	2.8
Kerala	15	7.0
Maharashtra	13	6.1
Manipur	1	0.5
New Delhi	100	46.7
Odisha	3	1.4
Puducherry	1	0.5
Rajasthan	9	4.2
Sikkim	1	0.5

continued on following page

Table 1. Continued

N= 214	Number	Per cent
Tamil Nadu	9	4.2
Telangana	1	0.5
Uttar Pradesh	13	6.1
Uttrakhand	1	0.5
West Bengal	5	2.3
Age of company		
05 or Less years	27	12.6
06 to 10 years	39	18.2
11 to15 years	33	15.4
16 to 20 years	39	18.2
Above 21 years	76	35.5
Total No. of Employees		
50 or less	160	74.8
51-100	28	13.1
101-150	5	2.3
151-200	9	4.2
Above 201	12	5.6
Capital (as per MSMEDAct,2006) (In Rupees)		
≤ 10 Lakh (Micro Company)	44	20.6
>10 lakh but ≤ 2 Crore (Small Company)	93	43.5
>2 Crore but ≤ 5 Crore (Medium Company)	28	13.1
Above 5 Crore (Large Company)	49	22.9
No. of inbound tourists handled last year		
50 or less	12	5.6
51-100	7	3.3
101-150	11	5.1
151-200	17	7.9
201-250	19	8.9
251-300	20	9.3
301-351	24	11.2
Above 351	104	48.6
Specific target market		
Leisure	150	70.1
Adventure	9	4.2
Business	40	18.7
Religion and Pilgrimage	15	7.0

The objective of the paper is to find out the perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT for destination India. For this objective H1 was formulated, i.e. perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by Ministry of Tourism (MOT) for India as destination. To test H1 descriptive statistics such as mean, standard deviation, reliability statistic, Shapiro- Wilk test of normality and Wilcoxon signed ranked test were used.

Reliability Statistic on the Data Related With Marking Efforts Made by MOT

The questionnaire formed to measure the view point of inbound tour operators towards effectiveness of marketing efforts made by MOT to position India as tourist destination at global level was tested for reliability and internal consistency using Cronbach α. The value of Cronbach alpha (α) is used to determine the overall reliability of scale. To assess effectiveness of marketing efforts made by MOT to position India as tourist destination at global level 24 variables related with marketing of India by MOT were asked to respondents (Indian inbound tour operators). Kline (1999) and Field (2013) recommends that a cut – off value of .7 is an acceptable value for Cronbach's α as values substantially lower than this indicate an unreliable scale. Cronbach's α value for marketing efforts made by MOT was .95 which specified that all variables representing marketing efforts to position India as tourist destination had high reliabilities and were proficient to give reliable results and validate them. Therefore, it can be concluded that the variables exhibited adequate internal consistence and reliability.

View of Inbound Tour Operators

To achieve the above stated objective related with perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT for India as destination, descriptive statistic was analyzed. In order to understand the usefulness of research done by MOT, tour operators were asked if 'Target markets identified by Ministry of Tourism through market research are helpful for marketing plans of your business' (M = 3.43, SD = 1.022) and 'The market research done by Ministry of tourism every year in the form of study reports and projects are useful for developing marketing plans for your business' (M = 3.25, SD = 1.017). The mean scores for both the statements were recorded above average, Further, response was also recorded related with 'if MOT communicates most appropriate image of India as a destination'. The response rate was above average (M=3.19, SD = 1.046). It can be stated that Inbound tour operators find MOT market research effective to understand tourist market for India. However standard deviation indicated that opinion of tour operators are spread out. Standard deviation is used to understand how measurements for a group are spread out from the average (mean), or expected value. If SD is low it means that responses are close to the average. Whereas high value of standard deviation means that the numbers are spread out (Walker & Helen, 1931). SD was observed above 1 which indicated that respondents were not unite in their opinion on issue related with market research.

Further, respondents were asked question with regard to marketing plan of MOT to position of India as a tourist destination at the global level. The mean value of variable 'MOT develops different positioning strategies while positioning India as a destination in different target markets' was average (M=3.35, SD= 0.905). Also responses were sought with regard to effectiveness of taglines and logos developed by MOT (M= 3.67, SD= 0.907) and advertising themes used are effective for positioning and branding

India (M=3.68, SD= 0.86). On the basis of above mean scores for three variables under marketing plan, it can be inferred that satisfaction level of inbound tour operators were found above average with the marketing plan of MOT to position India as tourist destination. The SD for all the variables was observed at higher side which indicated that respondents were not united in their opinion.

Next set of variables were related with collaboration of tourism industry by MOT during the marketing planning stage. Inbound tour operators were asked whether 'MOT seek inputs from travel industry before launching new schemes for promotion of tourism'. Inbound tour operators didn't agree on this issue as the mean value was observed M=2.94, SD= 1.00. Further, inbound tour operators were asked whether 'MOT gives value to the opinion and concerns of travel industry on the important marketing issues' (M=3.02, SD=0.95), 'MOT change their decision on the basis of feedback given by tourism industry (M=2.96, SD=0.88). On the basis of mean value of these three variables, it can be concluded that MOT don't inculcate view point of travel industry during the marketing planning stage. For this dimension also SD was observed little higher for all the variables which indicated the heterogeneity in the responses of tour operators.

Another dimension was related with promotional strategies for marketing of India. Under these dimensions effectiveness of promotional strategies to position India were measured in the view point of inbound tour operators. The respondent were asked to respond on the following promotional strategies for marketing of India adopted by MOT: 'Marketing plans of your business are in line with Ministry of tourism's Incredible India campaign' (M= 3.23, SD=1.040), 'The participation of Ministry of tourism in leading trade shows like WTM, ITB yield fruitful impact on India as a destination' (M= 3.52, SD=1.120), 'Special trade shows / events organized by Ministry of tourism in India like Bharat Parv, Tourism Investor's summit are useful for promotion of Inbound tourism in India' (M=3.26, SD=0.985), 'Destination promotional material of Ministry of Tourism like brochure CDs, tourist maps, pamphlets etc. effectively reinforce image of India as a destination' (M=3.48, SD=0.918), 'Ministry of tourism's overseas office helpful in promotion of tourism for India' (M=3.09, SD=1.051), 'Ministry of Tourism's international public relations and lobbying is strong and works effectively for the growth of Indian tourism industry especially during the crisis' (M=2.88, SD=0.981). For most of the variables inbound tour operators were of the opinion that promotional strategies adopted by MOT are effective as the mean value ranges from 3.10 to 3.50 which was interpreted as average. For two variables under this dimension i.e. help of overseas offices in promotion of tourism for India and MOT's lobbying and international public relations, mean scores were observed below average.

Further, responses were sought on the dimension related with financial support to tourism industry by MOT. Inbound tour operators considered the financial support given by MOT for promotion of India at abroad as the mean scores were observed average for the following variables under this dimension: 'Sales-cum-study tour towards tourism promotional activities abroad' (M=3.27, SD=1.057), for 'participation in fairs/exhibitions towards tourism promotional activities abroad' (M=3.38, SD=1.040) and for 'Publicity through printed material towards tourism promotional activities abroad' (M=3.36, SD=1.046).

MOT had launched some tourist oriented delivery mechanism adopting electronic technology. Inbound tour operators were asked to respond on the effectiveness of these tourist oriented delivery mechanism strategies of MOT. For two variables under this dimension inbound tour operators were found happy such as use of toll-free tourist helpline (M=3.36, SD= 0.93) and E-Visa (M=4.26, SD=0.826). Inbound tour operators didn't find book a tour package tab on the incredibleindia.org website useful (M=2.70, SD= 1.05).

Further, respondents were asked to measure the effectiveness of marketing campaign (IIC) launched by MOT in 2002 to position India as tourist destination. Most of the Inbound tour operators agreed that IIC was a success story (M = 3.79, SD= 1.046) and if IIC helped to attract more tourists (M = 3.72, SD= 1.037), 'the marketing plans of tour operators are in line with MOT's IIC' was average (M = 3.23, SD= 1.040). Maximum respondent tour operators were agreed that MOT's IIC should be revamped as per the present marketing conditions (M = 4.01) was above average. Although the SD for most of the variables for this marketing dimension was also above one which indicated that the opinions of the respondents were scattered.

On the basis of above descriptive statistics, it can be concluded that tour operators were of opinion that marketing plans adopted by MOT was effective to position India as a tourist destination at global level. However the respondents were of opinion that MOT didn't seek the opinion of tourism industry for marketing planning. MOT should inculcate suggestions/viewpoints of tourism industry during the planning of marketing strategies as the tourism industry is directly involved in selling the India as tourist destination at global level. MOT only involved in branding and positioning India and ministry is not involved in the selling process.

Test of Normality for Perception of Marketing Efforts of MOT According to Inbound Tour Operators of India

Further test of normality Shapiro -Wilk was applied to compare the scores in the sample to a normally distributed set of scores with same mean and standard deviation. If the test is significant ($p< 0.05$), it depicts that data is not normally distributed. It means that the distribution of sample is significantly different from a normal distribution. In the present study, the scores of marketing efforts for Shapiro-Wilk W (214) = 0.974, $p< .001$, were significantly non-normal. The analysis of Histogram (Figure 1) also confirms that the data is not normally distributed as the Histogram did not have approximate bell shaped curve. Therefore, on the basis of above results it can be inferred that the data marketing efforts of MOT was not found normal and thus support the use of non-parametric One-Sample Wilcoxon test to test H1.

RESULT OF HYPOTHESIS (H1)

To identify the perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT for India as destination, Hypothesis (H1) was formed i.e. Perception of Inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT to promote India as tourist destination at global level.

To test the hypothesis Wilcoxon Signed Rank Test was applied and it indicated that median of perception of Inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT (Observed Median =3.46) was significantly higher than the hypothesized median value3, T = 18,135.00, z = 7.48 and p = .001 < 0.05 (Significance value), hence $H_0 1$ not accepted i.e. Inbound tour operators don't perceive marketing efforts of MOT effective for positioning India as tourist destination at global level and $H_a 1$ is accepted i.e. Inbound tour operators perceive marketing efforts of MOT effective for positioning India as tourist destination at global level (Table 3).

Table 2. Descriptive statistic for marketing efforts adopted by MOT to position India as tourist destination at global level

S.No.	Statement (N=214)	Mean	SD
	Market Research		
1	Target markets identified by Ministry of Tourism through market research are helpful for marketing plans of your business	3.43	1.022
2	The market research done by Ministry of tourism every year in the form of study reports and projects are useful for developing marketing plans for your business	3.25	1.017
3	Ministry of Tourism communicates most appropriate destination image of India to targeted overseas markets	3.19	1.046
	Marketing Plan		
4	Ministry of tourism develops different positioning strategies while positioning India as a destination in different target markets	3.35	0.905
5	The tagline and logos developed by Ministry of tourism under Incredible India campaign are effective for positioning and support branding	3.67	0.907
6	The advertising themes used under Incredible India campaign are effective for positioning and support branding	3.68	0.868
	Collaboration with Tourism Industry by MOT during marketing planning stage		
7	Ministry of Tourism seek inputs from travel industry before launching new schemes for promotion of tourism	2.94	1.001
8	Ministry of Tourism gives value to the opinions and concerns of travel industry on important marketing issues	3.02	0.952
9	Ministry of Tourism change their decision on the basis of feedback given by tourism industry	2.98	0.883
	Promotional Strategy for Marketing Plan adopted by MOT		
10	Marketing plans of your business are in line with Ministry of tourism's Incredible India campaign	3.23	1.040
11	The participation of Ministry of tourism in leading trade shows like WTM, ITB yield fruitful impact on India as a destination	3.52	1.120
12	Special trade shows / events organized by Ministry of tourism in India like Bharat Parv, Tourism Investor's summit are useful for promotion of Inbound tourism in India	3.26	0.985
13	Destination promotional material of Ministry of Tourism like brochure CDs, tourist maps, pamphlets etc. effectively reinforce image of India as a destination	3.48	0.918
14	Ministry of tourism's overseas office helpful in promotion of tourism for India	3.09	1.051
15	Ministry of Tourism's international public relations and lobbying is strong and works effectively for the growth of Indian tourism industry especially during the crisis	2.88	0.981
	Financial Support to Tourism Industry by MOT		
16	Financial support provided by Ministry of tourism for undertaking Sales-cum-study tour towards tourism promotional activities abroad fruitful	3.27	1.057
17	Financial support provided by Ministry of tourism for participation in fairs/exhibitions towards tourism promotional activities abroad fruitful	3.38	1.040
18	Financial support provided by Ministry of tourism for Publicity through printed material towards tourism promotional activities abroad fruitful	3.36	1.046
	Tourist oriented delivery mechanism strategy of MOT		
19	The newly launched toll-free tourist helpline is contributing significantly towards better experience of tourist while in India	3.36	0.938
20	'Book a tour package' tab on the incredibleindia.org website is useful in getting additional booking for your organization.	2.70	1.059
21	E-VISA helpful for attracting more tourists	4.26	0.826
	Viewpoint on Incredible India Campaign		
22	Ministry of tourism's Incredible India branding campaign is a success story	3.79	1.046
23	Ministry of tourism's Incredible India campaign helpful in attracting more tourists	3.72	1.037
24	Ministry of tourism's Incredible India campaign should be revamped as per the present marketing conditions	4.01	0.891

Figure 1. Histogram for mean scores of perception of inbound tour operators towards marketing efforts of MOT

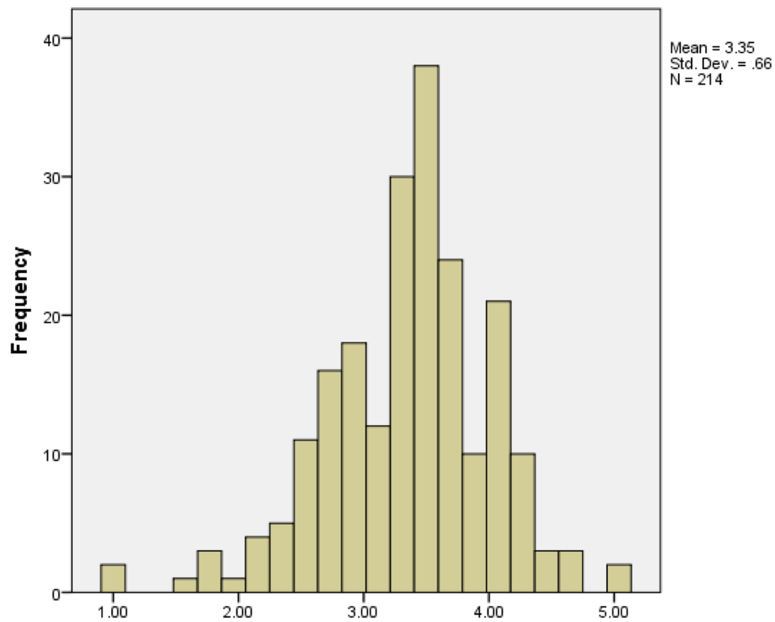


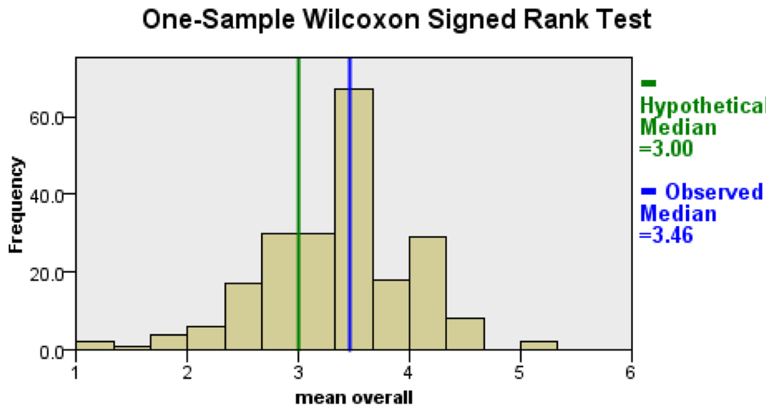
Table 3. One-Sample Wilcoxon signed rank test for measuring the perception of inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT for India as destination

Null Hypothesis	Test	Sig.	Decision
The Median of the perception of Inbound tour operators regarding the effectiveness of marketing efforts adopted by MOT for India as destination equals to 3.00	One-Sample Wilcoxon Signed Rank Test	.001	Reject the null hypothesis.

CONCLUSION

Ministry of Tourism, India is responsible to boost the destination India image and service quality in the target market.Due to intensive competition among destinations destination marketing is important to establish brand and image and to identify its product, target market and how best to reach and convince tourists to come at the destination. Destination marketing should be effective enough to satisfy the needs of all stakeholders as well as different market segments.Destination marketing and services provided at the destination are broadly impacted by tour operators and travel agencies. They hold an important position in the whole tourism system as they establish a connection between demand and supply of tourism. Therefore, it was imperative to understandthe perception of Inbound Tour Operators of India towards Marketing Strategies of MOT.

Figure 2. Model viewer for one-sample wilcoxon signed rank test perception of inbound tour operators towards marketing efforts of MOT



Total N	214
Test Statistic	18,135.000
Standard Error	900.344
Standardized Test Statistic	7.485
Asymptotic Sig. (2-sided test)	.000

The analysis brings the conclusion that the inbound tour operators perceive marketing efforts of MOT effective for positioning India as tourist destination at global level. However, inbound tour operators do not agree that Ministry of Tourism seek inputs from travel industrybefore launching new schemes for promotion of tourism. MOT should involve tour operators in the marketing process as they are most impacted by the marketing efforts of destination. Tour operators do not find 'Book a tour package' tab on the incredibleindia.org website useful in getting additional booking for their organization.Further, in one more area MOT needs improvement. Tour Operators of India have the opinion that MOT's international public relations and lobbying is not strong and it does not work effectively for the growth of Indian tourism industry during the crisis. However, overall inbound tour operators were found satisfied with the marketing efforts of MOT for destination India.

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KEY TERMS AND DEFINITIONS

India: Situated in Asian continent, India is seventh largest country by area and is known rich and diverse natural as well manmade touristic resources.

Ministry of Tourism, Government of India (MOT): MOT is the nodal agency for the development of tourism in India and formulates national policies and programs. The main objective of MOT is to increase and facilitate tourism in India and to establish her as a preferred destination in the world.

Chapter 12
Organizational Barriers to Knowledge-Sharing:
Evidence From Egyptian Tourism Companies

Mahmoud Ahmed Aboushouk
Pharos University in Alexandria, Egypt

Hala Hilaly
Alexandria University, Egypt

Nashwa Fouad Attallah
Alexandria University, Egypt

ABSTRACT

This chapter aimed at identifying and removing knowledge-sharing organizational barriers in the Egyptian tourism companies. The deductive approach and quantitative method were employed by this study. Moreover, a semi-structured questionnaire distributed to a sample of 278 tourism companies is used for data collection purposes. Structural equation modeling (SEM) is used for data analysis. Findings revealed significant effect of organizational barriers on knowledge-sharing behavior in tourism companies' context. A set of recommendations to overcome the perceived barriers of knowledge-sharing in tourism companies was introduced.

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INTRODUCTION

Tourism companies in Egypt work in an international climate for Tourism Activity moving towards innovation and development according to Abou Shouk (2012) therefore, they need to change their traditional way of working to avoid the threat exclusion of the international tourist market, and restore their role as mediators between the tourist and the tourist services suppliers who have started to sell their services directly through the internet, besides being able to compete the virtual tourism companies such as Expedia, trip advisor, booking.com, and Trivago.

Knowledge-sharing strategy has become one of the most applied strategies by major tourist organizations to cope with intense competition in a changeable world, and to meet the tourist needs searching for new and unique experience (Hu, Horng, & Sun, 2009). Tourism companies need to share knowledge to be able to retain and attract new customers or their services will become worthless (Brotherton, 1999;Tidd, Bessant, & Pavitt, 2005).

According to Mason and Pauleenis (2003) Knowledge-sharing is considered the most important factor in knowledge management, moreover (Lin 2007) defined it as a culture of social interaction that contains exchanging knowledge, skills, and experiences related to work among employees at the departments and the whole organization's levels.

Due to the lack of empirical research examining organizational barriers to knowledge-sharing adoption by Tourism companies, this study aims to provide new implications for professionals on removing organizational barriers for the process knowledge-sharing adoption in tourism industry.

LITERATURE REVIEW

Knowledge- Sharing (KS)

Knowledge was defined by (Davenport and Prusak 1998 ; Zheng 2005) as a mix of experience, values, information and expert insights which form a framework for evaluating and incorporating new knowledge.

In addition to (Call 2005 ; Abdul Aziz and Lee 2007; Weiling and Kwok 2007) who added that it is gained through experience or association and, it is often embedded not only in documents or but also in organizational routine, processes, practices and norms.

Explicit knowledge on one hand according to (Nonaka, 1994 ; Nonaka, Toyama, and Nagata 2000) is often referred to as 'know-what' rather than 'know-how', and it can be presented in words and numbers, as well as it has the ability to be shared in manuals, specifications and scientific data. Also (Smith, 2001) added that it can be in general saved in a codified form in databases in different types of media so it can be easily conveyed to the receiver without any misunderstanding, in addition to it can be reused for different purposes within the organization.

On the other hand, tacit knowledge is described by (Nonaka 1994) as it depends upon personal skills, expertise and develops through training and experience, and it is difficult to be transferred through communication with others.

Knowledge-sharing defined according to (Batrol & Srivastava, 2002; Hoof & Ridder, 2004; Lin, 2007; Kim & Lee, 2013) as a process in which individuals exchange knowledge containing their work experiences, expertise, know how, information, ideas, suggestions that jointly create new knowledge.

Furthermore, (Hoof & Rider, 2004; Usoro et al. 2007) added that this process includes two dimensions are; knowledge collecting and knowledge donating.

Moreover, another definition by (Alavi & Leidner 2001; Salisbury 2003; Usoro et al. 2007) described knowledge-sharing as a communication process between two or more participants based on sender – receiver relationship where knowledge is sent and received resulting in improving group performance.

Finally, the researchers describe knowledge-sharing as process where an exchange for tacit and explicit work related knowledge takes place including two sides are collecting and donating knowledge based on mutual trust to learn and build new capabilities for improving the organization's performance.

KNOWLEDGE-SHARING BARRIERS

Motivation is considered as one of the main factors required in an organizational development toward knowledge-sharing, and it should be designed and formulated considering various needs and expectations of the employees. Though, the absence of or insufficient rewards, lack of transparent reward and recognition systems were found according to the results of (Szulanski, 2003; Kim & Joh, 2005; Shahid & Alamgir, 2011; Gall et al. 2012) as main barriers to knowledge-sharing adoption. Moreover, Communication of aims and core values of organization must be flown in all its directions so, the absence of such communications was found as barrier to knowledge-sharing by (Shahid & Alamgir, 2011; Gall et al. 2012; Kim & Joh, 2005). Furthermore, the existence of informal and formal mechanisms in knowledge-sharing strategies within the organizations is needed to be able to carry out such strategies where (O'Dell & Grayson, 1998) found that the absence of these mechanisms is considered as a main barrier to knowledge-sharing adoption. In addition, knowledge codification process in databases which in many times is complicated and unclear so, it will be difficult when trying to access or retrieve knowledge from data bases which was found as a major barrier to knowledge-sharing according to (Santos, Goldman, & Souza, 2012). Beside, Knowledge-sharing process which requires resources including money, time, and efforts that must be allocated so, the lack of these resources was found by (Santos, Goldman, & Souza, 2012) as strong barrier to knowledge-sharing. Also, employees don't have the time to communicate with each other due to work load which is hindering knowledge-sharing process according to (Szulanski, 2003; Kim & Joh, 2005; Shahid & Alamgir, 2011; Gall et al. 2012; Santos, Goldman, & Souza, 2012; Awang, Kareem, & Ismail, 2014).Furthermore, many other barriers to KS were identified including, lack of up to date knowledge according to (Kim & Joh, 2005), intolerance of failure as mentioned by (Kim & Joh, 2005), knowledge nature where tacit knowledge is hard to share (Szulanski, 1996, Khalil & Shea, 2012), shortage in infrastructure supporting knowledge-sharing according to (Kim & Joh, 2005), cultural differences of employees in terms of communication style as stated by (Kaps, 2011), highly structured and multilayered hierarchy as compared to flat organizational structure according to (O'Dell & Grayson, 1998), organization's culture: Organizations try to change their culture to fit their knowledge management approach, but they fail because they should change their approach to fit their culture. Furthermore, any organization rarely have single uniform culture because every employee has a subculture which is different from those subcultures of the other employees making it more difficult to build collective practices and procedures as stated by (Mc Dermott & O'Dell, 2011; O'Dell & Grayson, 1998), lack of managerial direction and leadership where leaders cannot expect employees to share their thoughts and ideas just because it is the right thing to do, because they need support and encouragement from leader as mentioned by (Riege, 2005), functional boundaries where employees are grouped and put together according to the department that they are attached to. In addition, the seating arrangement in staff rooms may affect knowledge-sharing activities among them according to (Awang, Kareem, & Ismai, 2014), and the inability to retain the newly acquired knowledge within the organizations as mentioned by (Szulanski, 2003).

METHOD

The deductive approach and quantitative method were adopted where it uses hypotheses to explain the causal relationships among variables of the study according to (Saunders, Lewis, & Thornhill, 2009). The researchers used semi-structured questionnaire to measure two main constructs conducted during 1January to 5 February 2017. It was distributed among a sample of 278 out of 1008 tourist companies, selected using a simple random sampling technique with response rate of 85%.

DATA COLLECTION

The sampling frame for this study is category (A) tourism companies in Egypt. A complete list of these companies is available from the Egyptian travel Agents Association (ETAA). According to them in (2016), there was 1168 category (A) tourist companies in Egypt. They are located in 23 of Egypt's 27 governorates. Because of the high concentration of tourist companies in Greater Cairo and Alexandria in addition to the geographical spread of the other governorates throughout Egypt, totally, this sample frame consists of 1008 tourist companies.

This study used online questionnaire using Google form at http://goo.gl/forms/YqIU5iiFQP in addition to face-to-face questionnaire technique for collecting data. The simple random sampling technique involves selecting the sample at random from the sampling frame using random number tables, a computer random number generator, such as Research Randomizer (2008).

SAMPLE SIZE AND TECHNIQUE

The actual sample size calculated by the following formula by (Thompson, 2012):

$$n = \frac{N \times p(1-p)}{\left[\left[N - 1 \times (d^2 \div z^2)\right] + p(1-p)\right]}$$

where:

N = Population size
Standard Z = 1.96 (z value corresponding to the level of confidence required)

d = Error accepted level = 0.05
p = Probability level = 0.50

Based on the equation, the suitable sample size is 278 companies, which were randomly selected from the sample frame.

QUESTIONNAIRE DESIGN

The semi-structured questionnaire in this study; includes a mixture of closed-ended, open-ended and partially closed ended questions to allow the respondents to choose the most relevant answers and also add extra information.

VARIABLES OF THE STUDY

The main constructs of the study as shown in figure (1) are the perceived knowledge-sharing adoption practices, and barriers.

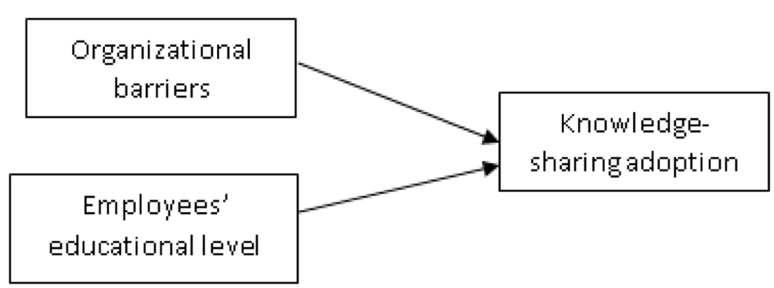
Based on the previous theoretical framework, this research tests the following hypotheses:

1. The perceived organizational barriers to Knowledge-sharing adoption in the Egyptian tourism companies have no impact on knowledge-sharing adoption.
2. The perceived organizational barriers to Knowledge-sharing adoption in the Egyptian tourism companies have impact on knowledge-sharing adoption.
3. There is no relation between the employees' education levels, and knowledge-sharing of tourism companies class A in Egypt.

These variables are developed from the literature review replicated from previous studies as the following:

Practices of knowledge-sharing adoption adapted from: (Davenport & Prusak, 1998 ; Walz &Niehoff 2000; Kim & Lee, 2006; Hamid & Sulaiman, 2013 ; Kim & Lee, 2013; Alhady et al. 2011)

Figure 1. Research model including the main constructs of the study



Organizational Barriers of knowledge-sharing adoption adapted from: (Szulanski, 1996; O'Dell & Grayson, 1998; McDermott & O' Dell, 2001; Szulanski, 2003; Evgeniou & Cartwright, 2005; Reige, 2005; Kim & Joh, 2005; Shahid & Alamgir, 2011; Kaps, 2011; Khalil & Shea, 2012; Gaal et al.2012; Santos, Goldman, & Souza, 2012; Awang, Kareem, & Ismai, 2014).

A Five-point Likert scales (1 for strongly disagree to 5 for strongly agree) were used to collect the perceptions of the tourist companies employees.

QUESTIONNAIRE LAYOUT

The initial questionnaire form was designed and then procedures were followed to validate the form and ensure that it measures what it was supposed to measure. The final questionnaire form is divided into Two parts included knowledge-sharing adoption and its barriers with response for each item ranges from strongly disagree (1) to strongly agree (5).

DATA ANALYSIS TOOLS

Structural equation modeling (SEM) the advanced multivariate technique was used for the quantitative data analysis. With its ability to measure complicated causal relationship among constructs, SEM is considered the highly appropriate analytical approach for this type of study (Olsson et al. 2000). Moreover, Wrap PLS software version (5) was used to conduct the structural equation modeling analysis.

It depicts the regression weights of independent variables on dependent ones. Also the statistical package for social sciences (SPSS version 20, Chicago, IL) is used to carry out the descriptive analysis and the correlation analysis.

QUESTIONNAIRE VALIDIDTY AND PILOT TESTING

To investigate the construct validity of the measurement model and its reliability, Table (1) shows that AVEs for all constructs are greater than 0.50 which is an evidence of convergent validity that refers to the overall amount of variance in the items accounted for by a latent construct as stated by (Bland & Altman, 1994) Cronbach's alpha and composite reliability for all constructs exceed 0.70 meaning that the measurement model is reliable.

MESUREMENT MODEL

The measurement model measures the relationships between the observed variables (indicators) and the unobserved variables (constructs) as stated by (Van de Wijngaert, 2010). To validate the measurement model, the construct validity should be assessed. The construct validity is assessed by looking at both the discriminant and convergent validities.

Table 1. Statistics of the measurement model

Constructs	Indicators	Loadings	AVEs	Cronbach's Alpha	Composite reliability	VIF
Barriers to knowledge-sharing adoption	Lack of resources	0.537	**0.569**	**0.771**	**0.826**	**1.493**
	Lack of time to communicate	0.562				
	Limited learning capacity	0.552				
	Poor communication skills	0.540				
	Lack of up-to-date knowledge	0.567				
	Intolerance of failure	0.420				
	Lack of transparent rewards and recognition systems	0.515				
	Perceived lack of job security	0.557				
	Shortage of infrastructure supporting knowledge-sharing (ICT)	0.585				
	The inability to retain the newly acquired knowledge within the company	0.519				
	The problem of "newcomer syndrome" in knowledge-sharing	0.570				
	Lack of managerial support	0.563				
	Functional boundaries among the company's departments.	0.527				
Practices of knowledge-sharing adoption	In a team setting, I would share knowledge with colleagues, who had assisted me in the past	0.660	**0.510**	**0.909**	**0.923**	**3.099**
	I cooperate/ communicate with other employees in teams for sharing information/ knowledge,	0.738				
	I can freely access documents, information, and knowledge held by other divisions	0.691				
	I am involved in knowledge generation/sharing activities	0.673				
	participate in seminars/ conferences	0.758				
	I make copies of articles and pass to friends	0.730				
	When I have learned something new, I tell my colleagues about it	0.727				
	Knowledge-sharing amongst colleagues is considered normal in my learning environment.	0.653				
	I would share knowledge with colleagues on the latest developments within/ outside company	0.706				
	I believe that knowledge-sharing among teams can help establish my image as an expert	0.743				
	I am willing to help other team members	0.738				
	I voluntarily share my know-how, information, and knowledge with other employees	0.667				
	I think it is important that my colleagues know what I am doing	0.660				

Source: researcher according to research statistical analysis' results

Discriminant validity means that the constructs must be different from other related constructs, for each pair of constructs according to (Tarling, 2009). Convergent validity refers to the extent of correlation between measures of the same construct, which should be related in reality as mentioned by (Golob, 2003). Average variance extracted (AVE) is used to assess discriminant and convergent validity according to (Dalgaard, 2008 ; Fornell & Larcker, 1981).

RESULTS

This section will first present findings on the demographic characteristics of respondents followed by results reporting practices of knowledge-sharing adoption, the perceived factors influencing knowledge sharing adoption, and the perceived barriers of knowledge-sharing adoption by the Egyptian tourism companies, Finally, The structural model and hypotheses-testing results will be presented.

DEMOGRAPHIC PROFILE

According to the results the respondents' educational level was 75% of them obtained university education and 13% of them are postgraduates.

KNOWLEDGE-SHARONG ADOPTION PRACTICIES

Results proved that the following knowledge-sharing adoption practices by employees of the Egyptian tourism companies are existed:

- When they have learned something new, they tell their colleagues about it,
- They participate in seminars/ conferences,
- They make copies of articles and pass to friends,
- They involved in knowledge generation/sharing activities,
- Knowledge-sharing amongst colleagues is considered normal in their learning environment,
- They cooperate or communicate with other employees in teams or groups for sharing information,
- They think it is important that their colleagues know what they are doing,
- They are willing to help other team members,
- In a team setting, they would share knowledge with colleagues, who had assisted them in the past,

Table 2. Square roots of AVEs and correlations among constructs

	Barriers to adoption	**knowledge-sharing adoption**
Barriers to adoption	**0.754**	
knowledge-sharing adoption	**-0.471**	**0.714**

Source: researcher according to research statistical analysis' results

- At work, I they would share knowledge with colleagues about the latest developments within/ outside the company,
- They believe that knowledge-sharing among teams can help establish their images as an experts, and
- They voluntarily share their know-how, information, and knowledge with other employees

PERCEIVED BARRIERS OF KNOWLEDGE-SHARING

It was found according to results that the perceived barriers of knowledge-sharing adoption in the Egyptian tourism companies are:

- Lack of resources,
- Limited learning capacity,
- Intolerance of failure,
- The problem of "newcomer syndrome" in knowledge-sharing,
- Poor communication skills,
- Lack of time to communicate,
- The inability to retain the newly acquired knowledge within the company,
- Lack of transparent rewards and recognition systems,
- Lack of managerial support,
- Perceived lack of job security,
- Lack of up-to-date knowledge,
- Shortage of infrastructure supporting knowledge- sharing (ICT), and
- Functional boundaries among the company's departments.

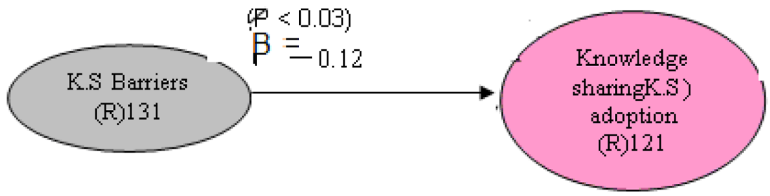
STRUCTURAL MODEL AND HYPOTHESE TESTING

Structural equation modeling (SEM) used for the quantitative data analysis. SEM is a confirmatory multivariate technique that allows the researcher to measure the relationships between the latent and the observed variables (indicators) (Robson, 2002). It establishes both measurement and structural models to address complicated relationships according to (Hair et al. 2010).

The structured model looks at the causal relationships among the unobserved variables as mentioned by (Hox, 2010). It depicts the regression weights of independent variables on dependent ones. In this study, there are 10 hypotheses to test according to Figure (2).

According to this research results the perceived barriers to Knowledge-sharing were found to have a negative impact on knowledge-sharing adoption by employees of the Egyptian tourism companies class A where (β= -0.12, $P<0.05$) so hypothesis 2 is supported.

Figure 2. The structural model
Source: researchers based on questionnaire analysis results



DISCUSSION AND CONCLUSION

The studies' results of (Davenport and Prusak 1998; Walz and Niehoff 2000; Kim and Lee 2006; Messmann 2012; Hamid and Sulaiman 2013) that determined the knowledge sharing adoption practices by employees agree with this study result that proved the existence of knowledge sharing practices by employees of the Egyptian tourism companies.

Furthermore, Previous researches results of **(**Kim and Joh 2005; Janoszka and Kopera 2014**;** Shahid and Alamgir 2011; Gaal et al. 2012; Kim and Joh 2005; Szulanski 2003**;** Szulanski 1996; Khalil and Shea 2012**;** Reige 2005**;** Evgeniou and Cartwright 2005, Awang, Kareem, and Ismai 2014) that determined the main barriers facing the adoption of knowledge-sharing by tourism companies agree with this research results.

Moreover, the study results of (Kim & Joh, 2005; Janoszka & Kopera, 2014; Shahid & Alamgir, 2011; Gaal et al. 2012; Szulanski, 2003; Szulanski, 1996; Khalil & Shea, 2012; Reige, 2005; Evgeniou & Cartwright, 2005; Awang, Kareem, &Ismai, 2014) agree with this study results where the perceived barriers to Knowledge-sharing were found to have a negative impact on knowledge-sharing adoption where (β= -0.12, $P<0.05$) so null Hypothesis H0 number 1 is not supported and alternative hypothesis H1 number 2 is supported.

In addition to, a below average positive correlation was found between employees' education levels and knowledge-sharing where (r= 0.347, with sig.= 0.000.) so hypotheses 3 is not supported.

It became clear that the perceived Knowledge-sharing organizational barriers have negative impact on knowledge-sharing adoption by the Egyptian tourism companies. In addition to, employees' educational level has a below average positive correlation with knowledge-sharing adoption practices.

More broadly, as such, this research contributes ideas that contribute to the improvment of knowledge-sharing adoption process within tourism companies through the following implications to overcome organizational barriers of knowledge-sharing adoption practices by employees of the Egyptian tourism companies.

Allocating the Needed Resources

CEOs and directors of tourism companies must be aware and understand the benefits of knowledge-sharing for their companies and compare these benefits with its costs in terms of money, time, and efforts in order to be convinced with the reallocation of these resources,.

Allocating Time for Employees to Communicate

CEOs and directors of tourism companies have to develop organic organizational structure where it provides low levels of formalization, simple rules, policies, and procedures, decentralized decision making which save a lot of time, as well as, communication flows in all directions. Furthermore, develop an online community using suitable technological application such as enterprise social networking systems (ESNS) etc.

Developing Employees' Learning Capacity

CEOs and directors of tourism companies have to provide training for their employees to improve their ability to access, store, use the new external work related knowledge also develop new departments to research and develop the company absorptive capacity for new knowledge.

Improving Communication Skills

CEOs and directors of tourism companies should themselves, as well as, their employees receive training to improve their communication skills.

Continuous Updating Databases With Up-To-Date Knowledge

CEOs and directors of tourism companies have to encourage employees to follow their new work related knowledge, attend their work related conferences, and events and highlight/ announce the new acquired knowledge to update the company databases.

Tolerance of Failure

CEOs and directors of tourism companies should develop a high openness environment and foster constructive and positive climate where employees do not fear sharing their knowledge because mistakes and failure in applying new knowledge is tolerated and job security is assured.

Provide Transparent Rewards and Recognition Systems

CEOs and directors of tourism companies must confirm fairness and consistency where employees must feel that rewards are given out for substantial reasons and according to clear criteria, rather than feeling that only the CEOs and directors' loyalists get the rewards. Furthermore, they must avoid unfair treatment to the employees.

Assuring of Job Security

CEOs and directors of tourism companies should have strong relationships with employees and help them to overcome any weakness through providing the needed training and peer assistance to assure the continuity of their employment in present and future. In addition to, reassure job security through making employees feel that they will continue working in that job by the end of their career.

Providing Infrastructure Supporting Knowledge-Sharing (ICT)

CEOs and directors of tourism companies should provide their companies with proper ICT infrastructure and applications to facilitate and support knowledge-sharing such as video-conference, newsgroup, groupware for instance (databases forum, sharing application, and electronic meeting systems), virtual team rooms, e-mail, voicemail, enterprise social networking systems (ESNS), and analytical systems such as decision support systems and data warehouses.

CEOs and directors of tourism companies should provide employees with training to get used to new information technology systems and processes.

Improve the Ability to Retain the Newly Acquired Knowledge Within the Company

CEOs and directors of tourism companies can protect and retain the newly acquired knowledge within the company such as market research, client or customer lists, software, new service production processes, and the yet-to-be released products or services that provide an economic advantage to the company through:

- Signing confidentiality or non-disclosure agreements with employees that may have access to sensitive business information lasts so long as the information remains secret to any one particularly those with whom he/she had a relationship.
- Filling a patent application covering the new service or process that has been developed.

Solving the Problem of "Newcomer Syndrome" in Knowledge-Sharing

CEOs and directors of tourism companies should establish mentor programs also select mentors in the departments to guide and teach junior and new employees and make sure that they learn everything that is required in the job.

Provide Managerial Support

CEOs and directors of tourism companies have to support their employees through providing them with the required physical, emotional, or psychological resources to engage in knowledge-sharing. In addition to, making them feel safe, useful, valuable and that they are making a difference.

Functional Boundaries Among the Company's Departments

CEOs and directors of tourism companies should locate work areas so that they can intersect with each other. Moreover, decide the seating arrangement in employees' rooms in a way permitting them to socially interact with each other. Furthermore, develop cross-functional teams to engage in knowledge-sharing.

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KEY TERMS AND DEFINITIONS

Organizational Barriers: Barriers related to an organization.

Knowledge-Sharing: Knowledge-sharing defined by the authors as a process where an exchange for tacit and explicit work-related knowledge takes place including two sides are collecting and donating knowledge based on mutual trust to learn and build new capabilities for improving the organization's performance.

Tour Operators: Tour operators put together all the different components of a holiday and sell them as packages to the consumer. Moreover, they make contracts with hoteliers, airlines, and other transport companies to put the package together.

Tourism Companies: Tourism companies include tour operators and travel agencies.

Travel Agencies: Travel agencies sell travel services (such as transportation, accommodation and inclusive tours) on behalf of principal suppliers of tourist products and services such as carriers, hotels, and tour operators for a commission.

Chapter 13

The Role of Public and Private Sector for Sustainable Tourism and Hospitality Business Development in Ethiopia:

A Case Study in Addis Ababa

Yezihalem Sisay Takele
Mekelle University, Ethiopia

ABSTRACT

In order to achieve the objective of the study, both primary and secondary data were generated by employing qualitative (using group discussion, in depth interview, and observation) and quantitative (mainly using survey and visitor survey questionnaires) methods. Purposive and simple random sampling techniques were used to select both private and public tourism sectors and 80 samples, respectively. The quantitative data was analyzed using frequency, percentage, and mean when appropriate while qualitative data was used to triangulate and substantiate the study. The finding result shows the visitor experience on the area of transportation and accommodation is the area where Addis Ababa falls far behind. There are several areas of poor performance (supported by both visitor questionnaires during the preparation of this study). Overall, the analysis identified that the industry (the role of public and private sector for sustainable tourism development in Ethiopia) is underperforming relative to the tremendous potential value to fasten for a tourism industry in the country.

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INTRODUCTION

The role of the tourism industry in Ethiopia's socio-economic development has always been recognized positively in the country. Noticeably, In Ethiopia the number of international tourist arrivals has grown in leaps and bounds since the national development plan in 1965 in which the importance of the tourism industry in economic growth and development was highlighted leading to an average of 63,833 arrivals by the early 70s (ETC, 1990). The Ethiopian tourist organization was established in 1961 to promote tourism and to encourage the establishment and maintenance of the necessary tourist facilities. After the establishment of Ethiopian tourist organization, the prominent tourist attractions were known as the historic route.

Regarding the beginning of tourism in Ethiopia, EMA, (1988) argued: the presence of tourism in Ethiopia spans is not more than three decades. The industry gained official acknowledgement by the foundation of the Ethiopian Tourist Organization in 1964. This had the aim of fulfilling the need for a central administration to plan and implement programmers, promoting touring and encourage the establishment and maintenance of tourist facilities. Based on the policy tasks the organization has done a lot to attract tourists.

After the fall of the Derg regime the current regime of the country followed free market by changing ETC to MCT with broad objectives and principles with the vision of to see Ethiopia's tourism development led responsibly and sustainably and contributing its share to the development of the country by aligning itself with poverty elimination (MCT, 2016).

Using the opportunity of free market policy a number of public and private tourism sectors such as hotels, tour operators, car rental companies, online travel agents, airlines, tourism offices, tourist information centres, souvenir shops, loges, tourist guide associations, tourism professional associations, accommodation and catering facilities, etc. were established. Ethiopia has established solid institutional bases for the development of the tourism sector. This work has been built on guiding and transforms the tourism sector into a "pivotal component of Ethiopia's economic development," and on commendable joint efforts by the public and private sector advocating that tourism be recognized as an important economic sector. Now a day's tourism and hospitality sector in Ethiopia considered as a means of different types of jobs for a millions of citizens who are interested and essentially working in the service industry, In 2014, the total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, was 8.5% of total employment 2,291,500 jobs (MoCT, 2017:43).

However, it still lacks a national tourism strategy that will guide its tourism growth trajectory and can guide the implementation of strong public and private sector joint effort to establish the legal framework for the development of the tourism sector in Ethiopia. Moreover, the legal instruments can integrate tourism development that lads responsibly and sustainably along with contributing its share to the development of the country by aligning with broad participation by the different stakeholders for poverty reduction.

Consequently, these studies were investigating the role of public and private sector for sustainable tourism and hospitality business development in Ethiopia: a case study in Addis Ababa. Therefore, the study will contribute to fill the knowledge gaps to show the irreplaceable role of public and private sector for sustainable tourism and hospitality business development in Ethiopia and the following research questions were the focus of the study.

RESEARCH METHODOLOGY

Materials and Method

The general reason that necessitates for selecting Addis Ababa as a study area is due to the high number of existence of public and private sectors that are working for the development of sustainable tourism in the country and can easily show the role of public and private sector for sustainable tourism and hospitality business in Ethiopia. To find out the level of participation for strong public and private sector joint effort and to establish the legal framework for the development of the tourism sector along with to explore the obstacles that hold back to develop sustainable tourism development in the study area were the major reason to select as a study site.

Sampling Technique

The number of household representative sample size is 80 using the following sample size determination formula adapted from Israel (1992).

n = N

$1 + N(e)^2$

where;

N = the total population
n = the required sample size
e = the precision level which is = (±10%)

Where Confidence Level is 95% at P = ± 5 (maximum variability). The public and private sector within the study area were more than 400 from this number the researcher establish from the above formula 79.757 sample size, accordingly, researcher were take 80 sample as a sample and the distributions of sample size were proportionally selected based on their size i.e. private sector (55) and public sector (25) sample were taken respectively. The sample consisting of 80 representatives for questionnaires, key informants for interviews were selected from the total sample population in the study area and study site that includes all bodies to have representatives, tourist from the study area, tourism officials and organizations working on tourism businesses

Tourist representatives (7) were selected based on purposive sampling technique that is based on their willingness and language. Tourism officials (8) were selected based on purposive sampling technique through their knowledge and experience. Organizations working on tourism businesses in the study area (12) i.e. tour operators representatives (4), souvenir sellers (4), hotels (20) were selected using convenience sampling technique that is based on their knowledge, experience, and date of existence.

The sampling technique on the study area and the study sites were selected with non-probability sampling technique purposively because of the existed tourism activities and public and private sector participations and those NGOs working on these areas to make it economically viable. The representative sample households were selected with the use of probability sampling technique, based on the name list of private sector in MoCT and the representative sample were selected using systematic random sampling technique.

Data Sources and Data Collection Instruments

Research methods is by Ringdal (2007) described as procedures and techniques to answer scientific questions and problems. There are two types of data collection methodology of research strategies - qualitative and quantitative methods. Qualitative methods aim to go deeper and emphasize the importance, while quantitative methods focused on the distribution and number (Thagaard, 2003). Primary and secondary data were used by employing both qualitative (group discussion, in depth interview and on spot observation) and quantitative (survey questionnaires). Concerning survey both open and closed ended questions were used to gather data from the representative samples of 80 of both private and public tourism sector. In this survey, background information, the role of public and private sector for sustainable tourism and hospitality business development in Addis Ababa, the level of participation for strong public and private sector joint effort to establish the legal framework for the development of the tourism sector and the obstacles that hold back to develop sustainable tourism development in the study area were obtained. The questionnaires were pre-tested.

Both open and closed ended questions were used to get information from the selected samples and the questionnaires were prepared in English. The survey questioner includes the role of public and private sector for sustainable tourism and hospitality business development in Addis Ababa, the level of participation for strong public and private sector joint effort to establish the legal framework for the development of the tourism sector and the obstacles that hold back to develop sustainable tourism development in the study area were attained.

During the survey simple participatory survey techniques (group discussion) that encourage dialogue and initiate informal discussions between private tourism business owners and employees was selected as a tool. After long discussion with the key informants, based on informal survey results, the selection were used for interview. Key informant interviews were conduct based on their knowledge and responsibility in relation to tourism in the study area and study site from tourists, guides, tourism official representatives, and organizations working on tourism businesses. Before formal interview a preliminary survey aided with check list was conducted to gather information's about the practice and it also provide opportunity to contact with key informants in the study area.

Method of Data Analysis

After data gathering all information were coded and entered into Statistical Package for Social Science (SPSS) version 16.0 for analysis. The results of analysis were interpreted and discussed using descriptive statistics (frequency, mean, and standard deviation). The data related with the role of public and private sector for sustainable tourism development in Addis Ababa, the level of participation for strong public and private sector joint effort to establish the legal framework for the development of the tourism sector and the obstacles that hold back to develop sustainable tourism development in the study area were obtained and analysed using descriptive statistics and the significance was tested by chi-square test at ($P<0.05$) significance level.

RESULTS AND DISCUSSION

The Role of Public and Private Sector for Sustainable Tourism and Hospitality Business Development

The public sector makes up a core component of the tourism industry. Many tourism products are based on public assets such as the natural and cultural environments. A key role of the public sector is to provide basic infrastructure, essential services, destination management and marketing, innovation, training. These are important components in providing a sustainable and profitable travel and tourism industry.

Ethiopian governments provide a policy and planning framework for environmental protection and heritage management and set strategies to encourage the private sector to take the issue of sustainability seriously. Private enterprises provide the basic tourism products, facilities and essential services, such as: accommodation, transport, restaurants, retail, various attractions and even experiences. This sector ranges from large vertically and horizontally integrated global corporations such as tour companies, airlines and hotel chains, to tiny, remote local family businesses, such as craft shops and lodges.

The private sector therefore, plays an essential role in the development and management of tourism and must be equally involved with national, regional and local government, in the management and sustainable development of tourism. Until recently, the travel and tourism industry has been hesitant in establishing public/private partnerships, because of the very competitive market within which it operates. Industry has been reluctant to participate in public policy objectives, in case they are required to do anything that will increase their costs, or otherwise reduce their competitiveness.

Public/private tourism partnerships however, can do quite the opposite. They represent a pooling of knowledge, expertise, capital and other resources from various stakeholders. There is gradually a growing awareness of the benefits of partnerships. They ensure consistency within a framework and act as an effective agent for planning, management, problem solving and change, and therefore enhance rather than reduce the competitive advantage of the tourism product. Whatever the tourism objective is, from economic development, poverty reduction, protected area management, conservation, cultural development or social justice, the travel and tourism industry is beginning to realize the power of collaboration and partnerships. Most important are the partnerships between local community, and the tourism industry, which provides opportunities for community involvement and participation in tourism is less existed. This integration has spawned a diverse array of new inter-organizational forms and agreements including regional planning authorities, joint management of protected areas, community-based cooperatives, and multinational firms. The role of national governments is to set the broad policy agenda and provide the framework in which development takes place yet it is not developed to provide a lead for integrating travel and tourism into overall policy for sustainable development.

Table 1.

Role of Public and Private Sector	Respondent			
	Private Sector		Public Sector Administrative staffs	
	Mean	STDV	Mean	STDV
Existence of Regulation	.7308	1.0591	.939	.53033
Infrastructure and facilities Development	.6410	1.1118	.930	.44876
Education and Training	.5934	1.1315	.055	.42287
Marketing and promotion	.5568	1.1044	.046	.35789
Bringing together key players and decision makers to discuss areas of common interest or concern	.5403	1.1051	.594	.47022
Participating with industry in awareness raising campaigns	.2692	1.0660	.700	.46398
Playing an important role in advocating bottom-up approach in tourism planning,	.2125	1.2125	-	.33333
Monitoring tourism developments	.2051	1.2525	.744	.36667

Level of significance of Role of Public and Private Sector *=10%, **=1% and no asterisk=no sig
Source: Own survey

Public and Private Sector Level of Participation for Sustainable Tourism and Hospitality Business Development

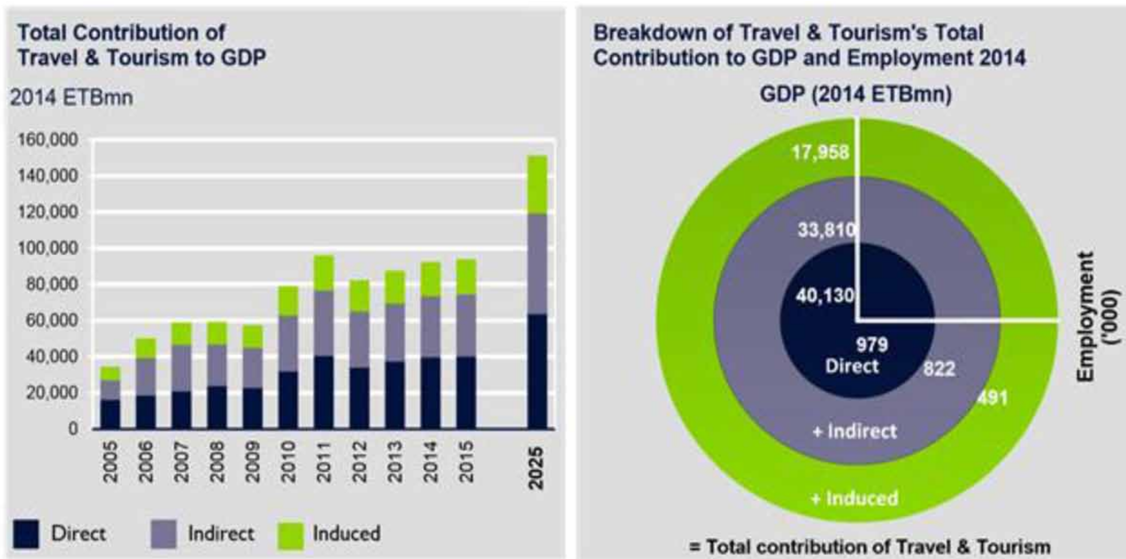
The Government of Ethiopia (GOE) has set in train an initiative to develop the tourism sector in Ethiopia. This study supports this objective through in depth analysis of the supply and demand sides of the sector and by proposing a focused and viable strategy to grow tourist visitation and revenues whilst supporting the GOE poverty reduction goals.

Now a day's tourism and hospitality sector in Ethiopia considered as a means of different types of jobs for a millions of citizens who are interested and essentially working in the service industry,

In 2014, the total contribution of travel and tourism to employment, including jobs indirectly supported by the industry, was 8.5% of total employment 2,291,500 jobs (MoCT, 2016). The study identified that tourism generated approximately expenditure revenue from a base of foreign visitors who came to Ethiopia for various purposes. Despite generally poor standards of accommodation and services for tourists, the study found that demand for the Ethiopian experience is high among individual consumers who recognize its uniqueness. It was found that the country's poor international image and visibility as a tourist destination is reflected in weak demand among international tour operators and travel agencies, who, in other countries are among the main sources of business.

The study also found that weak capacity in all but a handful of Ethiopian operators to promote and deliver their services prevents international operators from selling Ethiopian products; for example only 10% of the 400 or so European and UK tour operators and Africa specialist travel agencies trade in Ethiopian holidays. The supply chains in Ethiopia serving the tourism sector are weak and shallow with very little value being added beyond the profitability of the individual service providers (such as tour operators and hotels).

Figure 1.
Source: *Ministry Of Culture and Tourism Ethiopia, 2016*



In other countries studies have shown that this is an important dimension to grow for tourism to be successfully integrated into the economy; the more people who participate in tourism economy the better it tends to perform as whole. Perhaps one of the most important findings from the study was that the management of the sector by the various public and civil society players needs overhauling and refocusing and that there is very little capacity or expertise within the system to be able to do this.

Tourism worldwide is a private sector led industry and this renewed focus is a major challenge for Ethiopia. The major themes of weak performance identified during the study cantered on core issues of weak demand, weak products and an unfocused institutional structure to generate policies, regulate the sector and define strategies to grow. Within this context of rebuilding it is also necessary to be realistic about where impacts can be felt. Related to the management of the sector is the need for basic regulation of the industry in support of defined development strategies. It is clear from the market research that standards in tourism goods and services delivery across the board have to be raised in Ethiopia if it is going to grow its market share and this is an issue where government must be involved as a regulator and where capacity needs to be built within the current system.

Generally, tourism sector is considered as one of the means and essential component of Ethiopia's national development and transformation strategy. Currently faces there is massive unemployment, high rate of annual population growth, environmental degradation and underdevelopment of the productive forces remain as challenges that need solution.

As a labor intensive sector of the economy tourism has the potential of improving the lives of people and the economies of communities like Ethiopia. It should work to capitalize on the country's rich and diversified cultural heritage and natural resources. The promotion of both domestic and international tourism should address such important issues to change the poor international image and visibility of the country as a tourist destination in-order to boost the international tourist market demand.

Political instability, civil unrest and war can increase the perception of risk at a destination and generates negative publicity, which results in the inevitable decrease in tourist arrivals. The risk perception can influence tourist decision-making and destinations can be severely affected, with substantial negative economic consequences as tourists substitute their vacation destinations or regions.

Political stability is of extreme importance to any investment, but it is of special consequence to tourism because of what is being sold, serenity, leisure, fun and comfort. These can only be successfully marketed under stable political conditions. Tourist arrivals are a barometer not only of a nation's currency relative to other currencies but also of the safe living conditions of the citizens as well. Mass media plays a large role in shaping and formulating where certain images of a destination are portrayed so that it can attract but also detract potential visitors. Tourism can also be used as a tool for political and ideological goals, face reform by the industry of a particularly politically troubled nation. On the other hand, tourism can be moulded by political purpose, but the manipulation of tourism may result in disadvantage to tourism.

Reconciling Public and Private Interests

As economic liberalization has proceeded in Ethiopia and elsewhere, the role of the state in national tourism development has evolved. In Ethiopia and in many developed and developing countries the state previously played a leading role in defining and implementing tourism strategies, including in establishing its infrastructure, hotels, tour operators and managing sites.

Although both enterprises and governments can individually take action to enhance economic sustainability development and process of collaboration and partnership is a key element of sustainable tourism development. This is still done through partnerships involving international bodies, governments, national tourism authorities, international and national industry associations, travel and tourism companies, NGO's and the voluntary sector. Public/private partnerships are essential in order to launch a dialogue process on sustainable tourism between all stakeholders and identify mechanisms and action plans to achieve sustainable development goals in tourism. A nation's cultural heritage is a national good. More than 12 sites in Ethiopia are officially recognized as part of the globe's cultural wealth - global public goods. With respect to cultural heritage, due to its age, sensitivity and demand for preservation, tourism can be both of great risk and great opportunity. The risk is that the commercial benefits to be derived from tourism may create pressure for its unsustainable exploitation in ways that may create irreparable damage to these global public goods. The opportunity, on the other hand, of recognizing and allowing for the commercial exploitation of cultural assets, is to create an economic interest in, and financial flow from, the cultural asset which may be used, among other things, to ensure its sustainability. Finally, the private sector are yet not be in a position to invest aggressively in tourism, and create those positive spill over effects, without complementary public action in the form of policies, investments or incentives. The manner in which the state executes its governance function can have important implications for the nature of investment.

With this understanding one can define several clear rationales for the role of the state as a basis for strategy. The state is interested in the governance of tourism in a manner that encourages private innovation and investment, maximizes the public and community benefits from tourism, and ensures the preservation of cultural heritage and natural wealth of the country. The question of how to execute this role is the subject of national tourism development strategy.

Tourism as an Opportunity to Revitalize Ethiopia's Image

Increased tourism can be a very powerful tool to change international perceptions and images. Tourism has proven its worth as a rehabilitator of image in so many post-conflict countries and in Ethiopia's case, more than 20 years on from the from the humanitarian crisis of the mid-1980's, the military regime of the same decade and the fall of the Derg in the 1990s, tourism has a particularly important role in changing the outlook for Ethiopians as well as the image and images coming from the country. Ethiopia's predominant image in international media remains one of starvation, conflict and barren landscapes and many people in the West continue to see Ethiopia as a charity-case. The long-term vision of the government is to make Ethiopia one of the top ten tourist destinations in Africa by the year 2020, with an emphasis on maximizing the poverty-reducing impacts of tourism.

Depending on the measure used, this means at least quadrupling the current rates of tourist visitation to the country. Vacation tourists currently account for 31% of arrivals, business and conference 28%, and tourists visiting relatives 13% (MoCT). Growth has been strong in all of these segments in recent years, growing at an average annual rate of more than 13% but vacation tourism has grown fastest, at 25% per year. Within this segment, the dominant product is the cultural and historic heritage tourism.

Ethiopia has a limited budget for promotion and, given its limited budget and many other calls for resources, this will continue. Promotion spending therefore needs to be designed to have the maximum impact by closely targeting priority markets and using creative methods to promote tourism to Ethiopia. It is therefore critical, in the process of defining an investment strategy, to define the demographics and source markets for tourism products; what sells, where it sells, and who the competition is.

Accommodation Supply

A major weakness in the supply side of the accommodation sector is directly related with the limited numbers of existence with proper standards. While the hotel stock is limited, although currently ample for current levels of demand, it is also of poor quality with few facilities and has a limited supply of star and tourist quality hotel rooms, especially outside of Addis Ababa and the neighbouring Oromiya region. This situation is changing as an estimated 25 new hotels are currently under construction, of which at least 15 will be of tourist standard. The government currently owns just over a third of all hotel rooms but is attempting to sell a number of these hotels in its privatization initiative. Within the private sector, all but the Sheraton in Addis are domestically owned. This is partly because foreign investment in starred hotels was only recently permitted.

While there is a very limited supply, occupancy rates for Government-owned hotels are still low at around 50 percent for public hotels. Occupancy levels of private hotels average much higher in the region of 65-70 percent. Low occupancy rates in part reflect the seasonal problem of tourist arrivals noted earlier. Hotels are full in the peak December-January period and perhaps Easter but not at any other time of the year. This suggests that there is currently no supply constraint, a view supported by many tour operators and hoteliers in Ethiopia. In fact, the Ghion chain reports that 50 percent of their customers are walk-ins, suggesting there is often space available.

Role of Tour Operators

Tour operators are a critical link in the tourism supply chain and for long haul emerging destinations such as Ethiopia, tour operators based in source markets are the major driver of business. The link between international tour operators and the ground handlers they use (domestic tour operators) is particularly pertinent for Ethiopia because foreign investment in the sector is not permitted and so all are Ethiopian companies. This feature has put ownership of the tourism product very much in the hands of international tour operators because they have the resources to market effectively in source markets. In neighbouring countries domestic tour operators are the primary distribution platform for tourism products. For example, in Kenya (approx. 220 no.), Uganda (approx. 50 no.) and Tanzania (approx. 75 no.) local tour operators provide between 30-50% of business to lodges and resorts.

In Ethiopia there are more than 65 legal domestic tour operators and they provide about 55% of the business to the main hotels around the historic route, but in turn almost 80% of their business comes from international tour operators. The key difference is that foreign tour operators are allowed to operate in these countries. Because of the competitive environment, these foreign tour operators play an important role in constantly modifying and diversifying the product base, and, marketing the destination.

Tour operators actually create the product that ends up being sold to consumers and as such they are the innovators and originators of extra value-added at the destination level. It is critical for tourism development that foreign ownership is encouraged as it will raise the bar both in terms of price competition and innovation.

Private tour operators in Addis Ababa have only been permitted since the end of the Derg Regime prior to which the National Tour Operator was the government-owned monopoly in the sector. There are currently more than 75 tour operators in the market (of which about 15-20 handle most of the international business and a further 20 or so are active in the domestic market), all but NTO are privately owned.

Tourism to Preserve Cultural and Historic Wealth

For many years, Ethiopia has also attracted the discerning traveller. Thousands of years before the appearance of the Lonely Planet Guides, visitors extolled its attractions and wonders. The first illustrated travel guides to Ethiopia can be found in the friezes in the pyramids and ancient sites of Egypt.

These depicted trips to the land of Punt, which the Egyptians knew was the source of the Nile, and where they traded for gold, incense, ivory and slaves. UNESCO World Heritage Sites (as many as Egypt), four important national parks, a source of the world's longest river, and sites revered among adherents to Christianity, Islam and Judaism and diverse African traditional societies. As a cradle of civilization, with fossilized evidence of the ancestors of Homo Sapiens as old as 4.4 million years B.C., and the much more famous Dinknesh, or Lucy. These sites are distinctly Ethiopian, and the country as a whole is without colonial influences that are a feature in other parts of Africa; in this respect Ethiopia is unique.

Utilized Tourism for Poverty Reduction

The second part of the Government's vision for tourism is that it maximizes poverty-reducing impacts. One of the main challenges for tourism to position itself a key economic sector in developing countries is that market forces cannot equitably distribute benefits and costs (Butler, 1993), and there is a necessity for government policies and donor-financed tourism development programs that attempt to redistribute some of the excesses of a market and private sector-led tourism industry. The goals being to ensure a larger share of the profits from tourism are left behind in host communities and countries, and, that governments see benefits in the form of tax revenue from an expanded tourism economy, whether from general consumption and corporation taxes associated with tourism, or from taxes specifically targeted at tourists and the tourism sector.

Therefore, in the Ethiopian context, establishing and measuring links between tourism activity and poverty reduction are a critical rationale for considering public investment in the sector. Traditionally the impact of tourism has been measured in terms of its contribution to Gross National Product (GNP) and employment creation. Often tourism's overall impact on the economy is estimated by looking at the effect of tourism expenditures through direct, indirect and induced spending, using a multiplier effect approach.

Tourism growth is most often measured through increases in international arrivals, length of stay, bed occupancy, tourism expenditures and the value of tourism spending. However, none of these measures provide much insight into the magnitude of the impact on the poor and do not even enable stakeholders to gauge trends in tourism sector growth and relate these to any identified decline in poverty. It is recognized that poverty is multi-faceted and extends beyond the most widely applied income and consumption based definition of poverty.

The poor suffer low incomes and levels of consumption than what is deemed necessary to maintain basic human nutrition (extreme poverty) or to maintain a basic standard of living (general poverty). Common characteristics of the poor besides their income/consumption level include: low human capital development and limited employment opportunities, social exclusion and marginalization, and powerlessness. The poor suffer high levels of vulnerability to market changes or idiosyncratic shocks (e.g., illness, death of a family member) stemming from their low levels of savings and capital. Tourism, like any other industry, needs to be strategically and sustainably developed in order to unleash its potential positive impacts. Positive images and stories do not just find their way into the worldwide consciousness; they have to be placed there.

Obstacles to Develop Sustainable Tourism and Hospitality Business Development

From the visitor's perspective these opinions reflect some priority areas of concern; a) inconvenience of foreign exchange regulations, b) inadequate communications, c) poor quality information and interpretation of heritage products, d) weak transport linkages, e) unhelpful police, f) poor quality of accommodation, shopping and convenience for children.

The quality of facilities at tourist sites impacts both on the amount tourists spend and their relative enjoyment of the site. These facilities include information on the site, its history, individual items; handicraft sellers; public toilets; shops; banking facilities; places to eat; and accommodation (in park areas). While one must be conscious not to over commercialize some sites, there needs to be a base level of facilities on offer to increase tourism spending that is appropriate to the area. Obstacles to develop sustainable tourism and hospitality business development that are pointed out by interviews with both private and public tourism sector employees are:

- An underdeveloped communication system:
- Poor banking facilities:
- The limits on the acceptance of credit cards
- Professionalism of ground handlers (tour operators) in Ethiopia
- Lack of product knowledge
- Lack of information
- Poor image

Suggested solutions to develop sustainable tourism and hospitality business development that are pointed out by interviews with both private and public tourism sector employees are:

- Necessity to Building Strategic Partnerships
- Public investment
- Sector incentives
- Public-private partnerships
- Involving the community
- Sector coordination
- Promotion

CONCLUSION

The general objectives of the study were to investigating the role of public and private sector for sustainable tourism and hospitality business development in Ethiopia: a case study in Addis Ababa. By comparison with other countries, the visitor experience and convenience beyond transport and accommodation is the area where Ethiopia falls far behind. There are several areas of poor performance (supported by both visitor questionnaires during the preparation of this study). Overall, the analysis identified that the industry (the role of public and private sector for sustainable tourism development in Ethiopia) is under-performing relative to the tremendous potential value to fasten for a tourism industry. This is attributed to weaknesses in image building, market presence and penetration resulting in a noticeable weak demand for its products; a severely under-valued cultural and natural resource base; uncompetitive supplier and support services (hotels, transporters, activity providers, restaurants, handicraft manufacturers and distributors, banks, telecoms and emergency health services); finally the absence of an efficiently coordinating and communicating governance framework to guide and integrate the many stakeholders at both the national and sub-national levels. The final results are strong indicators of weak market presence and penetration by tour operators and accommodation facilities. The profile of these operators shows that they are either high-end highly specialized operators or the other end of the scale small budget overland truck companies catering to the “adventure” or “explore” market.

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KEY TERMS AND DEFINITIONS

Ethiopia: Is a country on the Horn of Africa, the largest and most populous country in that region.

Hoteliers: A proprietor or manager of a hotel.

Private Tourism Sector: Provide intensive training to local communities/private sector in various aspects of development and management of tourism businesses, and hospitality skills to provide them with better opportunities to seek employment in the tourism sector.

Public Tourism Sector: Are organizations at the Federal and the Provincial levels shall continue to play leading and catalyst role in development of tourism infrastructure (e.g., hotels, restaurants, road-side facilities, resorts, amusement parks, theme parks, etc.).

Tour Operator: Is a company that provides holidays in which travel and accommodation are booked for.

Travel Agency: Is a private retailer that provides travel and tourism related services to the public on behalf of suppliers such as activities, airlines, car rentals, cruise lines, hotels, railways, travel insurance, and package tours.

Chapter 14
Content Analysis of Online Visual Merchandising for Indian Online Travel Agents:
A Case of Makemytrip and Yatra

Farah S. Choudhary
University of Jammu, India

Alka Sharma
University of Jammu, India

ABSTRACT

The main objective of this chapter is to investigate the effect of online visual merchandising elements and identify the relative importance of the various visual merchandising cues to consumers' visits and booking through online travel agencies. In order to examine the relative importance of the visual merchandising of Indian travel agents, two most popular online travel agents, namely Makemytrip and Yatra, were selected. The data for the content analysis was collected from 100 respondents of each website who have visited each online travel agent namely Makemytrip and Yatra at least once. The respondents were asked to browse and explore the visual merchandising cues of the website and fill in the data at the same time. A detailed content analysis was done for both the online travel agents. For comparing the web portals chi-square has been used. The comparison analysis was performed on basis of various elements in the websites, namely website logo color, website main color, number of filters, bulletin board, comparison tool bar, interaction tool, search bar tools, detail information, custom made service, refund policy indication, number of travel service, ease of payment, image position, etc. A coding sheet was developed and designed to explain the various elements of online visual merchandising for these travel

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agent's portal in order to perform the content analysis. Findings showed the importance of online visual merchandising cues towards online travel agency websites. It also gave implications for online travel agents on how they can use online visual merchandising to attract and appeal consumers and travelers visiting their web portal. The study also reviews an extensive literature on online visual merchandising and presents a detail understanding of online visual merchandising and its elements and how online visual merchandising can be used differently and attractively in different web portals. The result of a chi-square test shows that there is a significant difference in all the factors of online visual merchandising cues. The chapter also gives implications for online travel agents as to how online visual merchandising can be used especially in online travel portals to attract travelers. The findings of the study provide valuable information for online travel agents for developing successful online portals using various web cues that may attract and draw interest of both the online browsers as well as the customers of web travel agents.

INTRODUCTION

The Indian hospitality and tourism industry has developed as one of the vital component for the growth and development amongst the services sector in India. In India, Tourism industry has substantial prospective due to the rich historical heritage and cultural, diversity in ecology, landscapes and places of natural beauty that has been spread across the country. The direct contribution of tourism & hospitality sector which includes the net value of output created by hotels, travel agents, airlines, other transportation services, restaurants and leisure industries that directly support tourists to GDP in 2017 was US$ 71.7 billion and this is expected to increase by 6.9 per cent amounting to US$ 76.6 billion in 2018. Also, it is expected that this direct contribution of travel & tourism to GDP will reach around US$ 148.2 billion by 2027. (Travel and Tourism Economic Impact 2017 India, World Travel & Tourism Council, March 2017). In compliance with its GDP contribution, this sector also plays a significant role in job creation. In 2016, the tourism sector directly reported for 5.8 per cent of the total employment in India. This percentage further increased to 8 per cent of the total employment opportunities generated in the country in 2017, which implies providing jobs to around 41.6 million people in India during this period.

In addition, the Indian travel and tourism industry attracts capital investment as well. In 2017, travel and tourism industry contributed to 5.7 per cent of the total national investment i.e. INR2, 387.7 billion (USD35.2 billion) and this number is expected to increase by 2 per cent annum to 52.3 million jobs by 2028. Further, it has been observed that the tourism and hospitality industry is among the top 10 sectors in India that attracts highest Foreign Direct Investment (FDI). According to the data released by Department of Industrial Policy and Promotion (DIPP) 2017, during the period 2000- 2017, the hotel and tourism industry attracted around US$ 10.90 billions of FDI.

Due to the increasing importance of travel and tourism industry, the Indian government has taken several measures to make India a worldwide tourism hub. Some of the major initiatives planned by the Indian Government in recent times are giving a boost to the travel and tourism industry of India. Under Budget 2018-19, the Government of India has allotted around Rs. 1,250 crore i.e. US$ 183.89 million for the Integrated development of tourist circuits under Swadesh Darshan and Pilgrimage Rejuvenation and Spiritual Augmentation Drive (PRASAD). In addition, the Government of India is working constantly to realize one per cent share in world's international tourist arrivals by 2020 and two per cent share by 2025.

Thus, we can conclude that Travel and Tourism industry has a huge potential of employment generation apart of being an essential source of foreign exchange for our country.

Travel Agency

Dolnicar, S., and Laesser, C (2007) proposed that travel agencies exist mainly as mediators between suppliers of travel services, such as airlines and railways etc. and customers. Unlike distributors of other industries, travel agencies do not deal with physical products but they detail with service in form of information. According to the study by Tsaur, S.H., Liang, Y.W., and Hsiao, H.Y. (2006), a travel agent is a person who undertakes a job for another person, who is known as a 'principal'. The principal in such an association not only sets the goals and objective of the job, such as selling of tickets, but also control the means and manner in which the job has to be done. Tsaur, S.H., Yung C.Y., and Lin, J.H. (2006) suggested that the primary role of a travel agency can be primarily summarized as: information, distribution, reservation and services. They also defined the various day to day functions of a travel agency. The functions defined are as follow:

1. Organising transportation - air, sea cruises, bus, rail, car rentals locally and abroad;
2. Planning individual itineraries, personally customized tours, group tours etc.;
3. Organising hotels, resort accommodations, meals, sightseeing, transfers of passengers as well as special events;
4. Managing and guiding on the information pertaining to travel and baggage insurances, foreign currency exchanges, necessary documentation such as visas, health certificates etc.;
5. Using professional know-how and experience in various travel related facilities and other transportation status and schedules, hotel tariffs and their standards and qualities;
6. Organising reservations for special-interest activities such as religious pilgrimages, sporting/adventure trips, business travels, educational tours, eco-tourist tours, etc.

Changing Role of Travel Agency

Over the last decade, there has been a major change and transformation in the travel industry and intense change has radically affected the nature and significance of information in the travel industry and, subsequently transformed the role of travel agency as well. Following are the major factors that have led to this transformation.

Commission Caps and Cuts

The travel agency business has undergone a transformational change over the past few years due to the radical reduction of their income. Since 1995, the airline fare commissions have been on the decline when the airlines levied a cap of $50 or 10% (whichever is lower) on commissions for the round ticket of domestic flights. Furthermore, travel agencies took another blow in the ending of 1998, the airlines imposed another cap. This time the cap was of $100 on round-trip of international flights that had no limit on commission in the past. But later, this commission dropped to 8% for both domestic and international flights (Tse, A.C., 2004).

The Internet and the Travel Industry

Traditionally, the travel industry used to emphasis on the travel agency sales channels. Earlier, customers use to visit their local travel agencies, and buy travel tickets and collect information about vacation through these agencies only. With the coming of internet and e-commerce the face of travel industry transformed drastically. Customers realised that they can search for travel destinations and can even book and purchase airline, train, cruise tickets online. Now customers know the importance of internet and have realised that how easy it is to use the Internet for travel arrangements. Popular websites such as Travelocity, Expedia and Preview Travel offer point and click results that can be accessed from anywhere and at any time.

According to an ASSOCHAM-Resurgent India study, there has been a rapid increase in the number of internet users in India. The internet users have increased phenomenally from 140 million in 2012 to 213 million in 2013 and it is expected that these online users will increase up to 400 million in 2018. Out of these total online users in India, almost 60% visit online retail websites and amongst these users, the percentage of customers as well as the number of orders per customer has been increased gradually. Additionally, the same study proposes that the number of consumers who purchase online is estimated to increase more than 150 million by the end of 2018 and online retail market likely to rise up to 65% by 2019. Additionally, it is estimated that by 2020 about 329.1 million people are expected to buy goods and services online in India. This indicates that about 70.7 percent of internet users in India will have purchased products and service online by that time.

In the present age of Globalization, companies are using new and latest information and communication technologies (ICT) to attract consumers and reach out to them 24 hours a day and 7 days a week. The information and communication technologies (ICT) have empowered almost one-third of the human population to exchange data, knowledge, news and other valuable information with anyone and anywhere in the world by just one click. However, this impact has not been restricted to individuals but has also affected the Business and Marketing activities in a substantial manner. Particularly, its use has encouraged greater customer participation, enabled mass customization and improved productivity, besides reducing costs. The Indian travel and tourism industry has considerably evolved from the initial days of digitisation, when the Internet dissemination was very less and Global Distribution Systems (GDS) had just facilitated the creation of an integrated network of travel and tourism service providers. The first e-commerce interactive website was Indian Railways which was developed in 2002. The portal was introduced so that the general community could book train ticket from anywhere in the world at any time. This portal revolutionised e-commerce in India. However, during 2005, the industry was further revolutionised and focus shifted towards making travel convenient the scenario with the introduction of Low Cost Carriers (LCC) in aviation industry. Travel related information, flight schedules and ticket booking facilities were available on web now through the portals of LCC. Thus, Indian travellers got to know about the e-ticketing in a substantial manner. The wide opportunity of consumer satisfaction in the e-ticketing sector encouraged e-retail and imparted confidence among entrepreneurs to enhance purchaser experiences by designing multiple online websites.

Also, due to rapid paced lives, currency changing hands within seconds and aggressive competition, the online market keeps evolving every second. This change is due to the quick technology adoption led by the rising use of electronic devices like smart phones and tablets and access to fast Internet connection through broadband and 4G, and several other technological and social changes which has subsequently increased the online customer base in India. Majority of growth in India's digital travel is increasingly being guided by tier-II and tier-III cities due to the fact that digital connections in these cities is rising constantly due to the increasing penetration of smartphones and the Internet specifically in these cities (e-Marketer, July 2017). Also, the Indian government's move of demonetisation to remove the high currency notes out of circulation in November 2016 further catalysed the growth of digital travel sales in the country during 2017. In 2017, India was estimated to have 3.7 per cent of the global digital travel sales and became the third-largest market by value in the Asia-Pacific (APAC) region. Also, it is expected that the sales for online travel booking is likely to increase at a Compound Annual Growth Rate (CAGR) of 14.8 per cent during 2017–21 (e-Marketer, August 2017). It has been noted that online sale of travel bookings which includes airlines, hotels, car rentals, cruises, accommodation aggregators and other transportation modes is expected to have grown upto 33 per cent in 2019.

This uprising of digital travel in India is also attributed by the increasingly digitally savvy Indian travellers. Further, technology has become an essential part of a traveller's gene including both personal and business purposes. Technology nowadays plays a vital role throughout the journey i.e. starting from research or planning for booking, payment, visa, currency exchange, travel, and even submission of claims and reimbursements.

The most substantial reform in travel and tourism industry has been with the coming of mobile applications, which have facilitated the whole user experience to be available anytime and anywhere. This include usage of mobile air tickets, cab hailing applications, online boarding pass, mobile check-in for hotels and even cloud passports in some countries in addition to the basic features such as payments, invoicing, search, booking and customer support. Moreover, the facilities like WIFI facility within flights and hotels, Virtual Reality based experience for especially hotel room booking support and RFID-based luggage tracking for air travel are increasingly made available to the travellers and making the modern-day traveller more digitally connected than ever.

As per a global online survey conducted by a travel commerce platform in August 2017 which included around 11,000 respondents who had taken at least one return flight in the year before across 19 countries, it was found that the Indians is the most digitally-savvy travellers worldwide. This survey also reveals few major characteristics of the modern-day Indian travellers, which principally signify that when it comes to travelling the Indian travellers, are highly influenced by technology. The major characteristics are as follow:

- **Searching and Booking Online:** Nowadays, most travellers search and book online and even travellers are using voice search. It was found from the same survey that around 67 per cent of the Indian travellers use voice search while exploring for a trip
- **Mobile-Friendly:** These days 71 per cent of the travellers use smartphones for search and booking, and around 82 per cent of the travellers prefer e-tickets and digital boarding passes due to convenience
- **Enthusiastic Social Media User:** While searching for travel, almost 87 per cent use videos and photos posted by their friends and around 83 per cent believe that while travelling being able to stay in touch is most important
- **Seeks Discounts:** Almost 85 per cent of the travellers use price comparison sites to look for special deals and discounts, and 58 per cent of them said that they spend substantial time to find best price.

In India, companies are competing with each other to improve their service delivery systems and are inspiring customers to discover newer service delivery platforms. It is found that the major transformation is in the way these travel agencies offer service and it is realized that the service transactions will improve through increased technology employment. However, companies need to strategically and tactically deal with the worries and doubts of the customer concerning technology as a facilitator in providing improved services in travel and tourism sector. Indian customers are technology-savvy, but whether they are keen to use e-travel models is a question worth thinking. In past few decades, India has witnessed the integration of the Internet in variety of services. Travel related websites have grown in recognition, as they provide abundant information about hotel rates, planning a holiday, railway tickets bookings, and availability of flight and describes list of major places one can visit. Websites such as SOTC tours, Thomas Cook, yatra.com, makemytrip.com, Rajasthan Tours and Travels, Raj Tours and Travels and many others are providing facilities and services online these days.

Thus, to conclude we can summarise that Indian travellers are highly conscious of technology usage in travel sector, and these travellers are most likely to get better in times to come as the availability of technology enabled characters are rising in this sector. Hence, it is essential for the industry players to leverage these features to build a strong connect with the country's travellers. Hence, this clearly indicates that the magnitude of potential online businesses has grown and will intensify more in Indian market. In travel industry, the Indian travel companies are also leveraging various tools, technologies and digital platforms- primarily to improve customer experience, build strong loyalties and run businesses efficiently. Thus, the travel websites are working towards rediscovering techniques and methods to stay with the changing pace in this sector. Therefore, Online travel agents have to give huge importance on the shopping behaviour of the travellers by delivering them better, fast, cheap and enjoyable experience while they visit their web portal. The online travel agents must conceptualize and design an online atmosphere in such a manner that it accelerates and stimulates consumer interactions (Dailey, 2004). So, it can be concluded that visual atmosphere or visual merchandising of a web- portal is a vital element to attract and retain travellers and thus, the online travel agents should put an extra effort to make their website as lively and interactive an experience as possible.

LITERATURE REVIEW

There are a lot of studies in the past on importance of ecommerce in travel and tourism industry. Mill and Morrison (2002) highlighted that the tourism sector is made of four components namely destination, travel, marketing, demand and travel. Further they also suggested that the destination as consisting of various components such as facilities, attractions and events, infrastructure, hospitality resources and transportation. In addition, the authors also argued that internet can be applied for all the components of destination mix, but it has been found that most of the past research has been centred around only online marketing by travel agents and hotels. In 1998, Cano and Prentice proposed a communication model for designing and managing websites specifically for tourism businesses and websites of Scotland. Standing and Vasudavan (2000) while examining various Australian travel agencies websites suggested the various stages of planning and strategies used in the functionality of these websites. They also presented the marketing models used and types of information provided by websites. Bonn (1998) identified various features of pleasure travellers on the basis of internet use. He found that the travellers mainly using internet to obtain travel information were college educated and were under the age of 45. Bonn found that the travellers who are widely using internet stayed in commercial establishments and spent more money traveling. Thus, it is found from the findings of Bonn (1998) that it is nearly impossible to overlook internet because of its benefits like convenience in updating, accessibility, real time information service, unique customization capabilities and interactive communication. Uysal in 1994 proposed that the destinations should be attractive to travellers who have the greatest impact on their economy and internet has the prospective of being a sustainable tool to access these destinations. Also, Hanna and Miller (1997) suggested that there are three main points in website development i.e. managerial issues, Page design, and information content. Ismail (2002) proposed that the websites must be technically sound, effective in their marketing principles and customer friendly. A study conducted by Jie Lu and Zi Lu (2004) gave the understanding of behaviour attitude and requirements of travellers visiting the tourism websites and defined the user satisfaction levels and identified key problems for present tourism website development in China. In their study, they found that there is not much correlation between number of tourists visiting a destination and number of tourism websites of that particular destination. The authors proposed that the number of tourists visiting a destination is determined by a lot of factors such as transport, reputation of landscapes and real services instead of only on web marketing. Jie Lu and Zi Lu (2004) suggested that the travel websites should only be considered as promotional tool for attracting customers, these websites only partially influence customer attraction in the tourism industry. Woodroof & Kasper (1998) classified the various type of website provider in China. They identified website providers based on China's situation as accommodation, tourism agent, government tourism administrative department; tourist destination organizations, personal and IT network company. They also classified various types of online service including single type service provided by tourism supplier (for e.g. exclusive hotel website only), intermediary service providers (for e.g. tourism agency website), and specific regional comprehensive websites (for e.g. city website).

Yi, Y. and Gong, T. (2008) proposed that the online travel purchase is related directly to the design and layout of the website. Further, Jeong, M., Oh, H. and Gregoire, M. (2003) also highlighted that online travel purchase is related to availability of information. They also underlined that in order to obtain orders, the online travel agents must be able to provide accessibility and hassle-free online services to the customers.

Hoffman, D.L. and Novak, T.P. (1996) hypothesized that while navigating online, customer's navigation activities consist of searching for information on products and services. Kim, H. (2005) proposed that online customer satisfaction is characterised as after-sales service, purchase result and price attractiveness, product information, log-on convenience, customer service, product attractiveness, payment method, site information and site design. Thao, H.T.P. and Swierczek, F.W. (2008) found that in developing countries, the customers are not comfortable with the technicality of the website and they find difficult navigating a website. Srijumpa, R., Chiarakul, T. and Speece, M. (2007) also gave similar findings that many times customers find Internet insecure and uncertain and thus prefer face-to-face interaction. Thus, in order to build relationships with customers; it is very important for the online travel service firm to address these concerns and electronic commerce provides huge opportunities for this. It has been found that for a consumer, Internet-based travel services present practicality and ubiquity, and permits them to compare and contrast offerings and prices at ease and at their leisure. As suggested by the study of Mazhatul, R. and Suraya, Y. (2005), the Internet has facilitated in building new relationships with retailers, and offers enormous opportunities for cost reduction in the travel and tourism service industry. It has been found that in some cases, internet services facilitate companies to strategically position them in the market and help them expand their delivery channels. (Brown, D.H. and Kaewkitipong, L., 2009). Also, the study found that the business organizations that have strong customer patronage intention and loyalty, find Internet as a natural extension of their service delivery channels and help them in expansion of their reach to consumers. In internet settings, the consumers don't have to interact and relate with the travel agent for their travel bookings. (Combes, G.C. and Patel, J.J., 1997). Machlis, S. (1997) stated in his research that very few consumers make bookings through online travel websites. He stated that most customers merely browse the website and only 1 to 5 per cent actually make booking and do reservation.

Thus to sum up, it can be concluded that it becomes important and vital for online travel agencies to encourage 'browsers' to become 'purchasers'. Therefore, online travel agencies have to give huge importance on the behaviour of customers by delivering them better, fast, cheap and enjoyable purchase experience. Customers relate the virtual website layout with the traditional off-line travel agents. They desire to talk directly to the travel agents and give their requirements about the destination and look for special discounts for the travel service they have selected and want to purchase. This has been made possible even in online store by creating a user friendly online store environment that has 3-D images of every product, attract videos of the product and exercising an option to select a product and put in the cart in the web stores. All this has made online store as lively and real, as shopping and selecting service in a physical store.

Henceforth, it can be concluded that visual environment or visual merchandising of a webstore is a vital element to attract and retain customers and thus, the online travel agents should put an extra effort to make it as lively an experience as possible.

Online Visual Merchandising

Visual Merchandising refers to the physical elements of a store design that attract consumer's emotions and persuade them to buy a product/service. The elements of visual merchandising include lighting, store layout and design, music, colour scheme of the store, and even odours have been extensively studied in the retail industry and consumer behavior literature. Cahan & Robinson, (1984); and Diamond & Diamond, (2003) have found that the various visual merchandising elements such as product presentation, mannequins, store design and layout, props and materials, lighting and signage effects product sales and store image in the retail environment. Due to the growth of internet penetration, more customers are shopping through internet and more retailers (both traditional and web-based) are going for web based retailing. As suggested by Ha, Kwon, & Lennon, (2007) though online retailers have an advantage to carry more assortment of products/service but on the contrary customers shopping online have more options available to them and thus the switching between the websites is at much faster rate. Therefore, it is very important for the retailers to design their website so as to attract and retain the customers. Since in online context, visual aspect is the only medium of communication between the retailers and customers and these days the only way to differentiate a website from the other is the way it appears and appearance is nothing but visual merchandising as defined by Kotler (1973). Dailey (2004) defines Online Visual Merchandising as the "conscious designing of web atmospheres to generate a positive effect in online shoppers in order to develop a positive consumer response." A study by Eroglu et al. (2001) has determined that the significance of store online visual merchandising in traditional retailing format becomes even more crucial in the online retailing environment. However, Lohse & Spiller, (1999) found that the first definition of Online Visual Merchandising was relatively insignificant as it only presented online retail atmosphere from the perspective of the quality of the internet interface characteristics and graphics. Afterwards, Ladwein (2000) suggested the concept of layout and design including readability of web pages, the ease of navigation and usage, the structure of a website and the interface features as the key factors defining the Online Visual Merchandising. Later, Childers et al, (2001) gave a new concept of "web-mospherics" based on the traditional retail store environment so as to describe the Online Visual Merchandising elements. Previous authors {Steuer, (1992); Coyle & Esther, (2001); Eroglu, Machleit & Davis, (2001); Dailey, (2004); Degor and Deschodt, (2006); Young Ha, (2007); Housman & Siekpe, (2009); Hong Sheng et. al. (2012); Lemoine, (2012); Loureiro & Roschk, (2013); Jiajing Wu (2014); Anji Ben Hamed Amara, (2016) and Sanjeev Prashar, (2017)} have also developed clear and well-structured customer researches to describe and predict the impact of e-consumer preferences, behaviour, attitudes and orientations within this changing online marketing environment. Harris, (1998) and Szymanski & Hise, (2000) presented that Visual Merchandising of a website attracts customers and influences their satisfaction while shopping through Internet. Menon & Kahn, (2002) found that the more attractive and pleasurable website may stimulate customers' buying decisions. They also found that when a website generates pleasure for customers, there is a positive influence on approach behaviours. Furthermore, extensive product information, design of a website, ease of navigation and engaging experience while surfing a site makes people satisfied and return to the websites (Rice, 1997 Szymanski & Hise, 2000).

For the past few years, studies of visual merchandising have not been confined to retail stores only but they have been applied to online context. Unlike, a physical store which can attract all the five senses; online retailing depends almost completely on visual aspect via screen which makes visual merchandising critically significant in online context. (Eroglu, Machleit, & Davis, 2001). Ji & Pang in 2006 had suggested that in a retail store, the products are physically displayed such that it helps the consumers to try on clothes, feel the material, and read information about care and contents on the labels. However, online shoppers may avoid buying through websites due to the inaccuracy and uncertainty of garment color, material, and details.

Website evaluation research results can be categorized into four classes. They are Application functionality evaluation; Cost benefit analysis; Customer (user) satisfaction assessment and Success factors identification. The websites functionality evaluation focuses on online service functions provided by E-commerce websites. Most such evaluation frameworks and models are from a customer perspective to investigate the extent, scope and comprehensiveness of the online offering. Cost benefit analysis is one of the popular methods to evaluate an information system. E-commerce application is a kind of information systems, many researches have attempted to identify main cost benefit factors and conduct cost benefit analysis for E-commerce applications such as Lu (2001) and Brown (2002). The core cost factors identified in Lu (2001) include the expense of setting up E-commerce, maintaining E-commerce, Internet connection, hardware/software and rapid technology changes. The core benefit factors include accessing a greater customer base, broadening market reach, lowering of entry barrier to new markets, alternative communication channel, increasing services, enhancing perceived company image and gaining competitive advantages. Customer satisfaction (user satisfaction) is an important aspect to evaluate websites has prompted to explore how to measure and model it. Customer satisfaction is positively related to the provision of customer needs (Woodroof and Kasper, 1998).

A set of criteria to assess customer satisfaction as a part of website evaluation, including information content satisfaction, usability satisfaction, security satisfaction, convenience satisfaction, efficiency satisfaction and flexibility satisfaction was proposed by Lu and Zhang (2002) . Usability satisfaction involves user satisfaction in information up-to-date, clear language style and links to appropriate resources. E-service website format design, facilitated browsing, search engine provided, accessing speed and customer control of a transaction process are considered as sub-criteria for convenience satisfaction. Customer satisfaction has become one of the dominant factors for the success of an E-commerce application.

Liu and Arnett (2000) proposed a framework to identify website success factors. Four factors that are critical to website success were identified: information and service quality, system use, playfulness and system design quality. In similar lines Al-Mashari and Al-Sanad (2002) listed a number of critical success factors for E-commerce through analyzing several reported case studies of successful E-commerce applications. These factors include user-friendly web interface, top management support, maintaining strong links with customers and suppliers, powering website with strong search engine, ensuring customer acceptance, and providing up-to-date information. Except a handful of papers related to tourism, online destination marketing and comparative study on tourism related websites have received insufficient attention.

In the retail store, visual merchandising includes store layout, signage, interior design, in-store promotion and product mix that stimulate purchasing (Harris, 1998). Applying this concept to the internet environment can help develop a completely new perspective for designing websites to be more profitable. Harris (1998) suggested some concepts that help in applying the proven notions of the retail store to website designs. Instead of a store plan and signage, online graphics and other design elements can be used to draw attention of the customers to websites. With regard to display and music, a colourful photograph of the product and its price highlighted just next to the image of the product plays an important role in attracting the attention of customers' and also the music played while opening the title page can build an exciting mood for the buyers (Harris, 1998).

Rice (1997) had earlier suggested that website design factors that help customer to visit a website again. Thus based on the fact, the study had 12 questions that can be categorized into two areas: the assessment of design and technology of the websites and the emotional experience of the customer during the visit to the website. The results of the study have concluded that a good website design is the major reason for the people to return to the websites. The second reason that was making customers enjoy the websites was finding what they were looking for with ease and also to offer them a fresh and enjoyable experience. The findings gave important guidelines for creating an effective and attractive website for the customers. Then and Delong (1999) and Allen (2000) suggested the importance of the layout and design of the websites for apparel related websites. As per the authors, visual design for a website is similar to the retail store layout. This shows that the main objective for store design and for the website design in both retail stores and websites is similar i.e. to attract the customers, to make them enjoy the environment of the store/website and motivate them to buy the product. Rowley, (2002) has indicated that Web images having both static and kinetic graphic make a website page look more attractive and interesting.

It has been seen that visual stimulus and interaction through various visual merchandising practices has been an integral part of the traditional store-based retailing (McGoldrick, 1990; Park et al., 2007; Pegler, 2001). However, it has not got the due importance in an electronic retail setting.

Khakimdjanova & Park, (2005) have highlighted that to lower down the perceived risks of purchasing online, the online retailers should put their stress on using 3-D product presentation and different angles for the whole view of the product. Furthermore, the features which allow the consumers to make their own virtual models reflecting their own body shapes and appearances help to reduce the insecurity for actual fit and final look of the garment. On the sme lines, Dahan and Srinivasan (2000) also suggested that consumers could have a similar experience of a physical presentation in a website through 3-D image presentation online. Park et al. (2005) have concluded that in online shopping context, there is a negative relationship between perceived risk and purchase intention.

This implies that in online apparel shopping, if perceived risks are reduced the consumers' purchase intentions increase significantly. Further evaluating the online visual merchandising, it has been found by Kim and Lennon (2000) that as in online shopping product and service information is negatively related to perceived risk and positively related to purchase intentions to thus to decrease perceived risk and to increase purchase intentions the websites should offer appealing and more elaborative product information using a range of resources of product presentation.

Then and Delong (1999) have also commented that if online retailers give more information through an attractive visual display of the product, then consumers will purchase more products online.

Further analyzing the consumer behaviour in online context, a research by Khakimdjanova & Park, (2005) have pointed out that more than 80 percent of the respondents chose a realistic human model to assess any product than the presentations on a fashion model, a mannequin, or a flat surface. This fact was also highlighted in a research by Wolfinbarger and Gilly (2003) who suggested that in online context, the most important factor of positive consumer behavior is website design that helps consumers in finding what they want in an efficient and effective manner.

The above discussion therefore highlights the fact that the future growth of any store depends to a larger extent on how it presents itself through strategic implementation of Visual Merchandising.

Purpose of the Study

The literature indicates that unlike traditional brick and mortar store environments which can attract all the five senses, visual interaction done through the screen is critical for online retailers as they have limited control of other senses (Eroglu, Machleit, & Davis, 2001). However, online atmospherics were studied in earlier research, but online visual merchandising and its effects on consumer behaviour hasn't been scientifically and methodologically tested, which leaves a gap that this research intends to fill in.

Furthermore, Online Visual Merchandising in Indian context is in infancy stage and very less work has been done so far. Most of the work has focused on the physical retail atmospherics and not on the visual aspect of a website. So, it is one of the early Online Visual Merchandising studies that is being undertaken in Indian e-commerce sector. As the Indian digital market is facing a high growth along with stiff competition, this study would help the industry to get an insight on using Online Visual Merchandising as a strategic tool to gain competitive advantage for long term sustainability.

The main objective of this study is to investigate the effect of online visual merchandising elements and identify the relative importance of the various visual merchandising cues to consumer's visits and booking through online travel agencies. In order to examine the relative importance of the visual merchandising of Indian travel agents, two most popular online travel agents namely Makemytrip and Yatra were selected. The data for the content analysis was collected from 100 respondents who have visited each online travel agents namely Makemytrip and Yatra atleast once. The respondents were asked to browse and explore the visual merchandising cues of the website and fill in the data at the same time. This was done due to the fact that data collected will be based on the factual and accurate and not on imaginary picture framed in the mind of the respondent about the web portal.

RESEARCH METHODOLOGY

Content analysis is a research technique which is used for making replicable and valid inferences based upon interpreting and coding textual material. The content analysis converts qualitative data into quantitative data by systematically evaluating texts such as documents, books, oral communication, websites etc. (Bauer, 2000). As per the findings of Holsti (1969); Krippendorf, (1980), the primary use of this technique is to identify and define patterns in a content—what the viewers observes through the senses, instead of what they feel or believe due to that content, or what the content producer intended—the technique can also be used for making inferences about intentions and effects. According to Krippendorf (1980), the first application of content analysis was in the 17th century, when the Church performed a systematic analysis of the content of newspapers. However, content analysis became a well-established paradigm in late 1940s Berelson & Lazarsfeld (1948). The most common use of this analysis in the field of written mass media content of advertising, communication, and journalism. Whereas, in recent times, Content Analysis technique is also being used extensively to examine content on the internet.

Web content analysis or Online content analysis is defined as a collection of research techniques that is used to define and make interpretations about online material through systematic coding and interpretation.

In the present study, a detailed content analysis was done for both online travel agents. For comparing the web portals chi-square has been used. The comparison analysis was performed on basis of 14 elements in the websites namely; Website logo colour, Website main colour, number of filters, Bulletin board, Comparison tool bar, Interaction tool, Filter position, Search bar tools, Detail Information, Custom made service, refund policy indication, number of travel service, easy of payment and Image position.

A coding sheet was developed and designed to explain the various elements of online visual merchandising for these travel agent's portal in order to perform the content analysis. This instrument has been used formerly by various researchers like Park and Stoel (2002), Khakomdjanova and Park (2005), Ha et al. (2007) and Kim & Lennon, (2009). However, for the purpose of the study, this instrument was further modified for the web portals used in the study.

The detail content analysis is given in the below table:

RESULTS OF CONTENT ANALYSIS

Various authors like Khakimdjanova & Park, 2005, Allen, 2000; Park & Stoel, 2002; suggested that colour is an essential criterion for a successful website. Hence, colour was included in the study. The highest main colour used in both Makemytrip 70 (35) and Yatra 70 (35) is white. In addition, Yatra uses Red 20 (10) and Grey 10 (5) colour similarly Makemytrip also used blue colour in addition to white. The highest main colour used in the logo of Makemytrip is Blue 60 (30) and Yatra used an equal mix of red 50 (25) and white 50 (25) in its logo. In case of refund policy, both websites use a mix of E-wallet, company wallet, bank account and coupons. But both websites use coupons less in comparison to other refund policies. In case of number of travel service, Makemytrip offers Flights, Hotels, Holidays, Railways, bus and cab service. Yatra also offers all these travel service except Cab service. The image position of Makemytrip's photographs was mainly placed in center and in case of Yatra it was placed on right. In addition, the position of filter in case of Makemytrip is Above and in case of Yatra, it is on left along with photographs. Also, it is found that Yatra offers more number of filters than Makemytrip.

Table 1.

Sl.No.	CRITERIA CONTENT		WEBSITE MAKEMYTRIP (n=100)	WEBSITE YATRA (n=100)	TOTAL (n=200)	CHI-SQUARE $\chi 2$
1.	Website Main Colour	Red		20 (10)	20 (10)	84.238***
		Orange				
		Yellow				
		Green				
		Blue	30 (15)		30 (15)	
		Purple				
		White	70 (35)	70 (35)	140 (70)	
		Grey		10 (5)	10 (5)	
		Black				
		Orange				
		Yellow				
		Green				
		Blue				
		Purple				
		White				
		Grey				
		Black				
2.	Logo Main Colour	Red	30 (15)	50 (25)	80 (40)	43.876 ***
		Orange				
		Yellow				
		Green				
		Blue	60 (30)		60 (30)	
		Purple				
		White	10 (5)	50 (25)	60 (30)	
		Grey				
		Black				
		Pink				
		Hanger				
3.	Refund Policy	E-Wallet	25(12.5)	30(12.5)	50(25)	8.432*
		Bank Account	25(12.5)	30(12.5)	50(25)	
		Coupon	10(12.5)	10(12.5)	50(25)	
		Company Wallet	40(12.5)	30(12.5)	50(25)	
4.	Custom Made Service	Available	63(31.5)	52(26)	88(57.5)	27.566***
		Not Available	37(18.5)	48(24)	85(42.5)	

continued on following page

Table 1. Continued

Sl.No.	CRITERIA CONTENT		WEBSITE		TOTAL (n=200)	CHI-SQUARE $\chi 2$
			MAKEMYTRIP (n=100)	YATRA (n=100)		
5.	Number of travel service	Flights	16.66 (8.33)	20(10)	36.66(18.33)	30.112***
		Hotel	16.66 (8.33)	20(10)	36.66(18.33)	
		Bus	16.66 (8.33)	20(10)	36.66(18.33)	
		Rail	16.66 (8.33)	20(10)	36.66(18.33)	
		Holiday	16.66 (8.33)	20(10)	36.66(18.33)	
		Cab	16.66 (8.33)	0 (0)	16.66 (8.33)	
6.	Image Position	Left	01(0.5)	5(2.5)	194(97)	6.082**
		Right	0(0)	95(47.5)	5(2.5)	
		Center	99(49.5)	00(0)	01(0.5)	
7.	Filter position	Right				6.082*
		Left		100 (50)	100 (50)	
		Above	100 (50)		100 (50)	
		Below				
8.	Bulletin Board	Available	92(46)	87(43.5)	179 (89.5)	55.752***
		Not Available	8(4)	13 (6.5)	21(10.5)	
9.	Interaction Tool	Chatting				131.843***
		E-Mail	10(5)	5(2.5)	15(7.5)	
		Phone call	80(40)	90(45)		
		Not Available	10(5)	5(2.5)	100(50)	
10.	Search Tool	Available	91(45.5)	97(48.5)	188(94)	7.888*
		Not Available	8(4.5)	3(1.5)	12(6)	
11.	Detailed Information	Available	97(48.5)	91(45.5)	188(94)	3.191*
		Not Available	3(1.5)	9(4.5)	12(6)	
12.	Ease of payment	Debit Card	25 (12.5)	25 (12.5)	50 (25)	1.222*
		Credit Card	30 (15)	35 (17.5)	65 (32.5)	
		Net banking	25 (12.5)	25 (12.5)	50 (25)	
		E wallets	20 (10)	15 (7.5)	35 (17.5)	
13.	Number of Filters	1-5	10 (5)		10 (5)	98.533**
		5-10	90 (45)	10 (5)	100 (50)	
		10-15		90 (45)	90 (45)	
14.	Comparison Tool Bar	Available	7(3.5)	5(2.5)	12 (5.5)	7.865*
		Not Available	93(46.5)	95(47.5)	188 (94)	

*p<.05, **p<.01, ***p<.001

According to Wikipedia, 2008, Word of mouth has become one of the most leading way by which people search in a particular website. So, retailers and online agents believe that a website must have a mode of interacting with its customers in order to build online patronage intentions (McWilliams, 2000). It has been found that there is a significant difference in both bulletin board and interaction tools. Both Makemytrip and Yatra has bulletin boards. The interaction tools used mostly in Yatra was Phone calls. However, the utilization degree of interaction tool in Makmytrip was slightly low in comparison to Yatra.

As per Park, 2002, the websites which has interactive search tools are more convenient to use for both the browser and the buyer as it decreases the time taken to search for the right service. It is seen that there is a significant difference in the search tools of Makemytrip and Yatra. Search tools are more effectively used by Yatra than Makemytrip. It was found that Yatra also offers Voice search in addition on its websites for the convenience of the people visiting its website. As a result of a chi-square test, there were significant differences in all factors. There are large differences in online visual merchandising practices between the two websites. Yatra had higher frequency in almost all the factors than Makemytrip. It seems that Yatra got the lead in online visual merchandising practices than Makemytrip.

Findings

Marketing travel destinations online has become the main focus matter all over the world and India is not an exception. In today's world, Tourism is no more a luxury. This is due to the technological advancement in transportation and information technology. The emphasis is progressively shifting from sight-seeing to experiencing and exploring various environments, cultures and life styles. This has led to various innovations in tourism marketing. Ministry of Tourism and the respective state governments are putting a lot of money into development of travel and tourism industry. In this setting, the researcher felt the significance to studying the usefulness of tourism websites in promoting travel destinations. To recognize the role of these websites and understand the extend how websites are influencing the visitor to visit the destinations; an effort is made to understand marketing interventions that help online web agents to attract customers. The marketing interventions are:

- **Richness in Information and Content:** Caution needs to be taken by the website providers to improve the attractiveness and appeal of the websites and in terms of information value added services like availability, status of accommodation or transport should be provided.
- **Interactivity:** Online booking and payments need to be endorsed and visitor's need to be protected by giving protection facilities likes user id and password. The websites need to be buyer centric. The feedback given by the customers on websites should be taken more seriously by online travel agents and they should they to incorporate the changes suggested in their websites.
- **Positioning:** Websites related to tourism needs to be positioned in a unique way. The authors feel that there is a need to provide more orientation information like a statement of scope and purpose of the site. It should also be appealing in terms of the products and services it markets which speaks about the destination.
- **Customization:** Online travel agents should be as customize and make their websites as user friendly as possible. It should be able to suggest visitors and browsers with tentative choices of packages and cost involved with it.

- **Linkages:** The website should be able to make linkages as many as possible both with search engines and with other related elements of tourism like food, accommodation, traveling, relaxation and shopping etc. that would rise the usability of an online website marketing destination.

Findings also showed the importance of online visual merchandising cues towards online travel agency websites. It also gave implications for online travel agents on how can they use online visual merchandising to attract and appeal consumers and travellers visiting their web portal.

The study also reviews an extensive literature on Online Visual Merchandising and presents a detail understanding of online visual merchandising and its elements and how online visual merchandising can be used differently and attractively in different web portals. The result of a chi-square test shows that there is a significant difference in all the factors of online visual merchandising cues. There are large significant differences in online visual merchandising elements between Makemytrip and Yatra. Makemytrip had better frequency in all the factors of online visual merchandising than Yatra. It appears that Makemytrip got the lead in how it attracts its travelers through its online visual merchandising than Yatra. The paper also gives implications for online travel agents of how online visual merchandising can be used especially in online travel portals to attract travellers. The findings of the study provide valuable information for online travel agents developing successful online portals using various web cues that may attract and draw interest of both online browsers and purchaser of the service provided by the web travel agents.

On the whole, the present research provides valuable information to online retailers to develop new strategies for developing effective visual merchandising of their websites in order to attract both online browsers who visit a website without a purchasing goal and shoppers who visit a website with a purchasing goal. Online Visual Merchandising elements may help online retailers to create the websites, which draw the attention of new customers. Therefore, to attract online browsers the online retailers need to differentiate their websites from other online retailers with features like more colourful icons and background and dynamic image display.

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KEY TERMS AND DEFINITIONS

Atmospherics: The presentation of a retail store and its products in such a manner that attracts the attention of prospective customers and encourages them to make purchases.

Bulletin Board: A bulletin board is a surface intended for positing of public messages, for example, to advertise items wanted or for sale, announce events, or provide information.

Content Analysis: Content analysis is a research technique which is used for making replicable and valid inferences based upon interpreting and coding textual material.

E-Wallet: An eWallet or a digital wallet refers to an electronic device or online service that allows an individual to make electronic transactions.

Online Travel Agents: They are basically traditional travel agents, expect customers self-serve, as they operate online. They are websites where consumers can conduct multiple searches, plan, and place an order for a booking.

Online Visual Merchandising: It is an act of using the visual elements to enhance the overall experience.

Search Bar: A search bar or search box is a graphical control element used in computer programs, such as file managers or web browsers, and on web sites.

Chapter 15
Impact of Consumer-Generated Content (CGC) on Travel-Related Decisions

Ankush Ambardar
Kurukshetra University, India

Himanshu Malik
Chandigarh University, India

ABSTRACT

While online portals have improved accessibility of resources and information to potential travelers and tourists, there is less existing literature about the impact of consumer-generated content on travel decisions. The chapter has analyzed the factors of motivation for creating, accessing, and using consumer-generated content in order to have a better planned travel decision, which results in a memorable trip. The research resulted in ranking the factors of motivation for creating, accessing, and using consumer-generated content in order to identify the need of today's traveler.

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INTRODUCTION

The direct contribution Indian travel and tourism industry in 2016 was INR 4809.8bn towards GDP which is 3.3% of GDP. This contribution is forecasted to rise by 6.9%to INR 5141.1bnin 2017 it is also expected that there will be a growth of 6.8% per annum to INR 9,948.5bn i.e. 3,5% of GDP by 2027 (WTTC, 2017). Ministry of Tourism (2018) in the annual report states that FTAs in India in 2017 witnessed a growth rate of 15.6% whereas in 2016 the number of FTAs was 8.8 million showing a growth rate of 9.7% over 2015. The report further states that in term of FEE 2017 experienced a growth rate of 17% with a FEE of INR 1,80,379 crore compared to INR 1,54,146 crore in 2016 with a growth rate of 14%.

Over the years word of mouth has been used a prominent source of marketing in Indian travel industry. The general inspiration and motivation to travel came from experiences which were shared by friends and relatives about their travel related decisions. The advice of friends played vital role in making a travel related decision if they have traveled to the specific destination. This tool of marketing for travel industry has evolved with the increased use and accessibility of internet and other forms electronic media. Travel alongside has also become a social status rather than a need. The traveler today doesn't only travel out of necessity but also to show his friends and relatives, connected to him on his social media accounts, that where he is travelling and what all he is experiencing during his/her trip. The way of sharing word of mouth has changed from verbal to digital the same has also increased its availability to access through online platforms. The word of mouth has become electronic word of mouth (Mukherjee and Nagabhushanam, 2016). E-Commerce also has drastically changed tourist behavior as of late. The travel and lodging arrangements has been especially influenced by this convenient method. A large number of tourists now make travel arrangements straightforwardly on the web, while they have controlled the habit of taking service of a travel and tour operator for the same as they used to (Ye, Q., Law, R., Gu, B., & Chen, W. 2011). There is a variety of online portals available for the tourists to access and compare various offers available online. While these online portals have provided a sea of opportunities for both tourists and service providers there is also a less explored side of the same. These portals also give access to consumer generated content which has an impact on travel decisions made by a tourist. Bhusal (2016) mentioned in his study that consumer generated content plays a very important role in creating E-WOM (Electronic word of Mouth) in Indian tourism industry which can result in changed preferences of a traveler for his future travel plans.

With the advancement in technology and its increased use in general day to day life has enabled the user to access and use this technology and platforms provided by the technology are widely accessed by the user to share their routine experiences with the help of mobile devices and social networking sites along with portals and platforms created by the service providers. In this context researcher Shukla (2016) while conducting research on electronic word of mouth, consumer behavior and travel industry in India, explored that the Indian traveler has become more aware about use of online portals, social networking websites and links on service providers website. In order to find out the quality service provided by any specific service providers or the level of services available to and from any particular destination the travelers use the reviews made available by early travelers. These reviews are available in the form of text massages, star rating, videos or pictures. The traveler today is not only using this electronic word of mouth to access the information about quality of services but he/she is also using these online platforms to share their experiences in the form of consumer generated content. Client created substance can demonstrate helpful in the movement area as it accompanies the capacity to feature human feelings and relate these to singular brand encounters.

Consumer generated content aides in rousing travel with the assistance regarding food outlets and hotels, travel agents and tour operators in the form of shared pictures and recordings from travelers. For example, South Africa propelled international travelers by urging them to involve in South African territorial and local campaigns. Later on, their bloggers posted photographs about the occasion and created reviews and posts sent by different travelers who shared their experiences. Consumer generated content has made great opportunities for organizations by enabling them to develop their piece of the overall industry through little efforts and cost. Consumer generated content can give a dependable and personal experience data relating to a specific tour or service.

World Economic Forum (2017) in the report *Incredible India 2.0 India's $20 Billion Tourism Opportunity* mentioned that Indian tourism industry is experiencing a rise in services provided through mobile devices the report states the fact that the use of mobile devices has increased from 9% in 2015 to 33% in 2016. This increase in mobile device usage has widened the scope of both providing and accessing information. This has resulted in better perception of travelers demand and preferences. In another research on the role and impact of social media in tourism with specific reference to, Madhya Pradesh, India researcher Gohil (2015) highlights that tourism and travel industry in India has relied on destination reputation, word of mouth, advertising and tourist opinion for marketing. Author further notices that use of social media is increasing at a significant rate by both service providers and travelers for sharing information and experience. Same can be used for providing better services as per the behavior and preferences of the travelers to market and promote the destination. While talking about E- word of mouth in tourism industry of India, Chauhan et al (2015) stated that the increased use of internet has facilitated the traveler with widened access to electronic word of mouth. The decreased trust of traveler in both the service provider and marketing resulted in creation and use of electronic word of mouth. The authors further stressed that it has become important to study the impact of electronic word of mouth in order take advantage of increased use of ICT in Tourism and Hospitality industry. In the same line of research Pandey and Sahu (2017) includes that social media and other online platforms has changed the way of communication between travelers, service providers and both. The technological advancement has provided with a common to share reviews and experiences online about the service providers, modes of travel and choice of destination. The authors state that if the antecedents of these online reviews and experiences can be identified these can be used to create a positive impact on marketing strategies for service providers and ease of choice and travel for travelers.

Del and Alarcon (2015) while doing their study on influence of consumer generated content on tourist choices in Italy states that consumer generated content has become mainly important in travel and tour industry as products and services offered by the industry are not easy to measure for quality due the intangible nature. As the purchase of tourism and travel related services and products does not involve a routine behavior and the purchasing decision involves a mix of emotional criteria the attention of traveler is pulled towards consumer generated content as this is believed to be more credible than the general and traditional sources of tour and travel information.

Research in consumer generated content has been conducted in various tourism activities by various researchers but the area has not been studied from multiple perspectives. Researchers in this research article have tried to analyze the impact of Consumer generated content on travel related decision.

REVIEW OF LITERATURE

Burgess et al. (2011) mentioned that consumer generated content is created by travelers or tourists those are using online platforms to share their experiences and opinions about the services provided by an individual travel site or travel agency with reference to their products. Tourist not only gives their feedback on product but also rate the behavior of service provider's (employees). This customer generated content can be in the form of online videos, messages or blogs etc. some time to build the trust of among customer service providers themselves make link available for the customers. For example, a travel agency or tour operator's official website which consist of the feedback of customers. Travel agencies, travel booking sites or tour operators provide such links on websites or mobile based applications to the tourists/travelers with the intent that they can interact with each other about the positivity of the service provider in the market and spread the word of mouth (Munar (2012). The travelers have been able to use social media and other online platforms for sharing their opinion in the form of electronic content with the development of web 2.0. This technological advancement introduced the concept of consumer generated content in tour and travel trade (cox et al. 2009; Munar, 2012).Cox et al. (2009) further identified and explained the stages in relation to the activities of tourist/traveler with consumer generated content. Authors did it through the travel planning process. Three main categories were identified for stages being before trip during trip and after trip. All these stages are connected with consumer generated content created and shared at every stage. Tourist always reads the on line reviews before selecting a place to travel. Not only about places but also keep on searching about available modes and service providers for travel facilities. Tourists compare the prices and service at destination before finalizing the tour.

After travel, tourists share their experiences in the form of reviews, rating or comments. The researches used the framework of travel planning process in their study which does not cover the recent updates and technological advancements in various online platforms, social networking sites and official websites of service providers that can be used to create, share and refer consumer generated content. Digital travel think tank (DTTT, 2015) in their online trend report discussed various latest developments in various online platforms, social networking sites and official websites of service providers in relation to haw and when during three stages of travel planning a traveler comes across the consumer generated content and uses the online platforms to access content generated by other travelers and share his experience in form of consumer generated content with other travelers.

Zeng & Gerritsen (2014) analyzed that an individual travelers' ability and interest in using or creating consumer generated content generally depends on the demographic profile of the traveler/tourist. The researchers continue to analyze that consumer generated content was not always considered very reliable by the service providers only in recent times service providers are relying more on consumer generated content than relying on the reports generate by their marketing team.

To further understand in detail how a traveler is acquainted with consumer generated content, Dahlen et al. (2010) considered it important to understand that how a traveler decides about next travel plan.in addition to this the authors concluded in six stages faced by a traveler/tourist while making the decision which are tourist recognize the need, look for information based on their functional or psychological needs, evaluates other similar offerings, make a purchase, consumption/ post purchase evaluation. The author further concluded that consumer generated content can influence travel decision making at any stage. Furthermore, Burgess et al. (2009) in their research about benefits and concerns on consumer generated content concluded that there is an argument about reliability or trustworthiness of consumer generated content as in one opinion the consumer generated content can be trusted because it the opin-

Table 1.

Sr. No	Stage of travel planning process	Activities	Consumer generated content
1	Before Trip	1. Engagement with social networking sites and other collaborative sites which inspires to travel. 2. Finding information about modes of travel along with service providers and their prices. 3. Decision making 4. Planning and buying process	Referring to the content developed by other travelers based on their experiences and opinions.
2	During Trip	1. Engagement with mobile applications for navigation, location, communication, and sharing opinions and experiences as they occur.	Referring to the content developed by other travelers alongside creating online content for other travelers based on personal experiences.
3	After Trip	1. Uses social media, mobile applications and other online plat forms to share overall experience of the trip	creating online content for other travelers based on personal experiences.

Source: author's illustration

ion and feedback of the individual who have physically and personally experienced it while the other opinion says that this content might have been generated fake by an individual to fulfil his/her personal vested interest. While continuing to analyze the previous researches the study of Mendes et al. (2010) on consumer generated content and consumer empowerment in travel sector showed interesting results the authors argued about single concept consideration of consumer empowerment and concluded that consumer generated content helps in empowering three components of consumer empowerment namely content empowerment, social empowerment and process empowerment which jointly empowers the travel decision making. In same vein, Kane (2011) concluded that travel is tourism is an information intense industry, web 2.0 sites drastically changed the way how travel information created and shared amongst travelers in the form of consumer generated content through pictures, videos, comments and blogs. The author also concluded that this information is created to updated family, friends and other travelers who are willing to travel from one place to another. While talking about use of social media and consumer generated content as a marketing strategy for travel and tourism trade Manap & Adzharudin (2013), find out that consumer generated content when spread on social networking sites can used as a great marketing strategy to create awareness and interest about any particular travel and tourism related product or service. The author further continued and criticized the travel and tourism trade for lacking a strategy of utilizing consumer generated content through social networking sites. With this background this study aimed to fulfill following research objectives.

The objectives of the study are:

- To analyze the motivation of creating consumer generated content.
- To identify the motives of using consumer generated content for travel decision.
- To identify the mostly useable sources for accessing and creating Consumer generated content by travelers

RESEARCH METHODOLOGY

The objective of the study was to understand the ideas behind creating consumer generated content. The study area was Chandigarh region of India. To carry out the study, a structured questionnaire was formulated based on comprehensive review of literature. Travelers were asked to reflect the motivation behind using consumer generated content on 12 statements in relation to factors motivating travelers to create consumer generated content. A Likert-type scales ranging from 1 strongly disagree to 5 strongly agree was used for this purpose. Second part of questionnaire consists of seven identified sources used for accessing and creating consumer generated content. Travelers were asked to give their score on Likert- type scale ranging from 1: Never to 5 Always. The sample size for the study was 150. 25 responses were rejected for incomplete information. The data was analyzed with the statistical package for the social sciences (IBM SPSS 20 for Windows). The basic analysis and tests utilized in this study includes Descriptive Statistics.

DATA ANALYSIS AND INTERPRETATION

The profile of travelers drawn from responses collected is shown in Table 2. The frequencies recorded for demographic profile of respondents indicated that maximum travelers i.e. 62% were from the age group of 25-30 years, followed by 33 travelers i.e. 22% fall in the age group 20 to 25 years, 15 respondents were from the age group of 30-35 years and only 9 respondents were having an age above 35 years. In relation to gender maximum were male travelers i.e 76% and 36 (24%) female travelers participated in this study. Looking at qualification 69 respondents were undergraduate and other 81 were post graduates. When the respondents were asked for hours daily spent on internet usage the responses showed that 30 respondents were using internet for up to 2 hours daily, 90 respondents used it for 2 to 3 hours and remaining 30 respondents used internet for 4 or more hours daily. The frequency of travel is recorded at 21 respondents are traveling sometimes, 126 were traveling often and only 3 were travelling very frequently.

Through the review of literature 12 variables were identified as factors motivating travelers to create consumer generated content. Table 3 shows the ranking of these factors based on the mean of responses given by respondent in order to asses if they consider a variable as important motivating factor for creating and posting consumer generated content. The table indicated that respondents consider 'social status' as most important motivating factor for creating consumer generated content, while 'getting identity' and 'self-esteem' are ranked at 2nd and 3rd place as motivating factors. The 12 rank was given to the factor 'providing emotional support'.

The respondents were also asked to agree or disagree to a particular variable in order to identify whether the it is a motivating factor for the traveler to use consumer generated content while making travel related decisions. Six variables relating to this aspect are ranked in table 4 the travelers consider 'evaluation of alternatives' as top most reason for using consumer generated content. Whereas travelers do not agree that consumer generated content may reduce the risk of product failure as 'reduction of risk' was ranked lowest among 13 factors.

Table 2. Demographic profile of the respondents

Demographic profile of respondent		Frequency (Valid Percentage)
Age	20-25 years	33 (22.0)
	25-30 years	93 (62.0)
	30-35 years	15 (10.0)
	35 years or more	9 (6.0)
	Total	150 (100.0)
Gender	Male	114 (76.0)
	Female	36 (24.0)
	Total	150 (100.0)
Qualification	Under graduate	69 (46.0)
	Post graduate	81 (54.0)
	Total	150 (100.0)
Daily internet usage	Up to 2 hours	30 (20.0)
	2 to 3 hours	90 (60.0)
	4 hours or above	30 (20.0)
	Total	150 (100.0)
Travel frequency	Sometimes	21 (14.0)
	Often	126 (84.0)
	Frequently	3 (2.0)
	Total	150 (100.0)

Table 3. Ranking of factors motivating travelers to create consumer generated content

Sr.No	Factors	Mean of responses	Rank
1	Providing emotional support	1.1200	12
2	Finding friends	2.9600	6
3	Building relations	3.5200	5
4	Commitment to society	2.8600	7
5	Getting identity	4.9000	2
6	Self esteem	4.3200	3
7	Helping others	2.7800	8
8	Providing advice	3.7400	4
9	Controlling quality of service	2.7800	9
10	Product suggestion	2.7800	10
11	Gaining prestige	1.2600	11
12	Social status	4.9600	1

Table 4. Ranking of factors motivating travelers to use consumer generated content

Sr. No	Factors	Mean of responses	Rank
1	Learning about destination	2.9600	5
2	Evaluation of alternatives	4.3400	1
3	Confidence in decision making	4.1600	2
4	Reduction of risk	1.2600	6
5	Efficient planning	3.7400	3
6	Saving time	3.5200	4

The analysis of responses taken in order to identify the sources for creating and accessing consumer generated content is represented in table 5, the table shows that when it comes to accessing consumer generated content the respondents prefer blogsites the most in order to make travel decision followed by social networking sites and official sites of travel agencies, travel books are least preferred as a source for accessing consumer generated content. On the other hand, if a traveler has to create consumer generated content social networking sites like Facebook are preferred most followed by electronic word of mouth in form of reviews or feedback and online travel booking sites. Again, travel books are least preferred also for creating consumer generated content.

FINDINGS

Motivations for Creating Consumer Generated Content

The study has resulted in following findings in order to achieve the research objectives. The first objective of research was to identify the motive of creating consumer generated content. To achieve this objective, twelve variables were identified through review of literature namely emotional support, finding friends,

Table 5. Ranking of sources used for accessing and creating consumer generated content

Sr. No	Factors	Source used for creating consumergenerated content		Source used for accessing consumer generated content	
		Mean	Rank	Mean	Rank
1	Electronic word of mouth	3.5000	2	2.8200	6
2	Travel book	1.8800	7	1.3400	7
3	Social networking sites	4.4400	1	4.3400	2
4	Official websites of travel agencies	2.0800	5	4.2800	3
5	Online booking sites	2.8400	3	4.1800	4
6	You tube	2.8000	4	3.7400	5
7	Blog sites	2.0400	6	4.4400	1

building relations, Commitment to society, getting identity, self-esteem, helping others, providing advice, controlling quality of service, product suggestion, gaining prestige and social status. These variables are than ranked on the basis of mean of responses provided by the respondents. Which has resulted in following ranking to answer to objective 1 i.e. to analyze the motivation of creating consumer generated content.

Rank 1 Social status
Rank 2 Getting identity
Rank 3 Self esteem
Rank 4 Providing advice
Rank 5 Building relations
Rank6 Finding friends
Rank 7 Commitment to society
Rank 8 Helping others
Rank 9 Controlling quality of service
Rank10 Product suggestion
Rank11 Gaining prestige
Rank 12 Providing emotional support

Motivations for Using Consumer Generated Content

Second objective i.e. to identify the motive of using consumer generated content for travel related decision, was achieved through ranking of mean of responses for 6 variable identified as motivating factors for using consumer generated content which are, learning about destination, evaluation of alternatives, confidence in decision making, reduction of risk, efficient planning, saving time. The mean of responses has ranked the variables like following.

Rank1 Evaluation of alternatives
Rank 2 Confidence in decision making
Rank 3 Efficient planning
Rank 4 Saving time
Rank 5 Learning about destination
Rank 6 Reduction of risk

Sources Used for Accessing and Creating Consumer Generated Content

The objective 3 i.e to identify what source is most for accessing and creating Consumer generated content, is also interpreted by analysis of means of responses for following variables being considered for accessing and creating consumer generated content.

Source Used for Creating Consumer Generated Content

Rank 1 Social networking sites
Rank 2 Electronic word of mouth
Rank 3 Online booking sites

Rank 4 You tube
Rank 5 Official Web sites of travel agencies
Rank 6 Blog Sites
Rank 7 Travel Book

Source Used for Accessing Consumer Generated Content

Rank1 Blog Sites
Rank 2 Social networking sites
Rank 3 Official Websites of travel agencies
Rank 4 Online booking Sites
Rank 5 You Tube
Rank 6 Electronic word of mouth
Rank 7 Travel book

LIMITATIONS AND SUGGESTIONS

The present research is attempted to understand the connection of consumer generated content and travel decision making, while writing the research report following limitation have been realized in context to present research.

1. The research is confined to Chandigarh region of India.
2. The research has considered only the travelers having access to online resources.
3. The research does not cover all the dimensions of online travel arrangements.

Based on experiences that occurred during the course of research and findings of the study following suggestions are made for stake holders.

1. Travel service providers should focus more on Consumers generated content as a positive tool for marketing.
2. Travelers and service providers both should restrain from sharing fake information.
3. Traveler should trust consumer generated content accessible on reliable platforms only.

SCOPE OF FUTURE RESEARCH

Though a lot of research has already been conducted by various researchers in the research area of consumer generated content by the names of user generated content, electronic word of mouth etc., there are multiple dimensions consumer generated content that can still be explored. The future research in the similar field of knowledge can conducted in relation to:

1. Offline aspects of consumer generated content.
2. Consumer generated content as marketing strategy to attract millennials.

CONCLUSION

The travel industry is booming in India, with development of the industry the traveler is also getting more aware and more demanding. The young generation is more technically advance and aware with the development of technology. The industry has to learn how to use the information available in the form of consumer generated content for benefit of traveler, service provider, society and environment at large. The applications of consumer generated content in the travel industry are endless. The research highlighted that traveler is using consumer generated content to access information related to price, destination, services and comparison for making travel plans effective and time saving. On the other hand, the traveler is creating the consumer generated content to be connected with society, friends and family, for showing and maintaining a social status especially on social networking sites. The travel service providers should consider the consumer generated content in order to become effective and efficient service provider.

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Chapter 16
Marketing Strategies of Travel Agencies and New Technologies Used for the Marketing Strategy

Çiğdem Unurlu
Trakya University, Turkey

ABSTRACT

In the 21st century, increasing technological opportunities and globalization has affected tourism mobility significantly. The purpose of this study is to point out the increasing importance of travel agencies and tour operators that have important functions in the distribution of touristic products and to evaluate the marketing strategies used by travel agencies in the world today where human mobility has gained momentum. In this respect, secondary data have been used, and a critical literature review has been conducted. The marketing strategies used by travel agencies and the technologies related to these strategies have been reviewed. From this point, among the marketing strategies used by travel agencies, market segmentation strategies, growth strategies, competitive strategies, market share strategies, and product life cycle strategies have been addressed. Then, new technologies such as central reservation systems, the WAP technology, and digital broadcasting, which are used in the marketing strategies of agencies, have been evaluated. Finally, the sales techniques that agencies use in their marketing strategies have been reviewed.

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INTRODUCTION

The tourism sector, which has been taking an increasingly bigger share from the world economy in the 21st century, is among the fastest developing sectors of the service sector. It also has an extremely important place in the economies of the developing countries. The technological opportunities increasing in the globalisation phenomenon have significantly affected consumption patterns and consumer preferences (Bahar& Kozak, 2008: 56). In this regard, the establishments in the sector must adapt to the changing market conditions faster and become more flexible. This situation shapes the production, pricing, distribution and promotion of touristic products and services and points out to the significance of the marketing of touristic activities. This rapid change in the information and communication technologies has fundamentally changed the way establishments work. In this regard, marketing strategies should be addressed again, updated and developed in the adaptation process of travel agencies and tour operators in the distribution system of the tourism sector to these technologies. Travel agencies must diverge and become different from their competitors in the competitive environment that has been increasing with global markets. From this standpoint, this study, which evaluates the contemporary marketing strategies used by travel agencies, is considered to shed light on this matter. From this point forth, firstly, travel agencies and tour operators have been evaluated, and afterwards, the marketing strategies of travel agencies have been addressed in this study. Market segmentation strategies, growth strategies, competitive strategies, market share strategies and product life cycle strategies have been studied regarding the marketing strategies of travel agencies. In the continuation of the study, new technologies used in the marketing strategies of travel agencies and their sales techniques have been evaluated. In the 21st century, the way establishments work has been fundamentally changed with the globalisation phenomenon and the Internet revolution. The tourism sector has taken more than its share from this change. Especially the Internet, which is a direct marketing instrument, has been perceived as a threat for tour operators and travel agencies. In this regard, it is an undeniable fact that the competition conditions of the 21st century have its own unique dynamics. Therefore, it is considered that this study in which the marketing strategies of travel agencies are evaluated will shed light on this problem. The topics addressed in the study and their page numbers are as follows:

Travel Agents and Tour Operators

In terms of tourism legislation, according to the Regulations of Travel Agencies Association no. 1618, travel agencies are defined as "business organisations which offer tourists with transportation, accommodation, sightseeing, sports and entertainment opportunities for profit; provide all the related services; and contribute to the tourism economy and generally to the balance of payments." Moreover, travel agencies have functions such as (1) developing tourism, (2) introducing tourism and contributing to e-marketing activities, (3) finding new destinations and bringing them in tourism, (4) creating price discrimination in touristic products, (5) reducing the prices of touristic products, (6) providing tourists with consultancy services (Yalçın, 2017: 3). The tourism sector uses travel agencies to effectively reach the markets which have outspread into a geographically very wide area. It is estimated that there are over 100.000 travel agencies, 32.000 of which are in the USA, around the world. 70% of the customers of travel agencies include individuals travelling with business and leisure purposes (İçöz, 2001: 363).

World Travel Organisation defines tour operators as “establishments which organise both mobile tours and tours with accommodation in a specific centre by combining transportation, accommodation and other tourism products before the travel and tourism demand is created, and provide these tours for a certain amount of price” (Emir, 2016: 78).Travel agencies and tour operators are indispensable elements of the tourism distribution system. The popularity of the Internet and information technologies has led to the functions of travel agencies and tour operators being questioned. However, mediation in travelling and creating products are areas which require exclusive knowledge. No matter how developed technology becomes, individuals still enjoy doing their business with other individuals. The fact that humans are social beings and need the services of others signals that travel management will live on in the future (İçöz, 2007: 81).

MARKETING STRATEGIES OF TRAVEL AGENCIES

Marketing strategy for establishments in the tourism sector includes the suppliers of touristic products, environmental factors (including competition) and decisions and actions for the purpose of planning activities regarding the comparison of consumers (İçöz, 2001: 189). In this respect, marketing strategies for travel agencies are regarded in the frame of (1) agencies providing travel activities, (2) environmental factors, and (3) consumers. Marketing strategies in travel agencies occur within the scope of these three elements.

In addition to this, marketing strategies are evaluated considering the effect of several different variables. These include consumers, the structure of the market and industry, the position of the company in the market, the market opportunities and resources of the establishment (İçöz, 2001: 192). The target audience affects the structure of the market, the conditions of competition and the strategies that travel agencies need to follow. In this regard, the marketing strategies used by travel agencies are as follows: (1) market segmentation strategies, (2) growth strategies, (3) competitive strategies, (4) market share strategies, and (5) product life cycle strategies (İçöz, 2001: 195).

Market Segmentation Strategies of Travel Agencies

The most fundamental element in marketing strategy is consumers and their needs (İçöz, 2001: 192). However, consumers refer to a heterogenous structure. This structure must be homogenised according to specific criteria. In this respect, agencies need to identify the target market with the process of segmentation. The services that agencies provide could be summarized as organizing tours, organizing congresses and fairs, selling the tickets of transport vehicles, making transfers, providing information services for visa and customs, making reservations on behalf of third parties and providing car rental services. While tour operators are regarded as the wholesalers of the sector, travel agencies are referred to as the retailers of the sector. Tour operators need to diversify the tour types by taking customer needs into consideration. Tour operators identify the target market in respect to some criteria such as ages of tourists, preferred accommodation period, being economical, qualities, distances and purposes. Some of the segmentation criteria often used in the identification of target markets by tour operators are as follows (Albustanlıoğlu, 2009: 14):

Tours According to Age

1. Student markets,
2. Adolescent market,
3. Family market,
4. Middle-aged group market, and
5. 3rd group of age.

Tours According to Accommodation Type

1. **Sejour Tours:** They are tours which require long-term accommodation.
2. **Itinerancy Tours:** They are tours which include staying in one place for a couple of days and travelling several areas.

Tours According to Being Economical

1. Luxury Tours: Luxury tours are tours with the best accommodation and transport opportunities whether it is domestic or abroad. Considering the tour groups, the number of people participating in these tours is not generally above 25-30 ages.
2. First Class Tours: Their prices are less compared to luxury tours and the standards of service units are below the luxury class. The target audience usually involves people who are above a middle income level.
3. Economical Tours: These are the tours with the lowest level of prices among all the tour types. The target audience usually involves people with an average level of income and the youth, therefore, the accommodation and catering facilities used in the tours are of a quite mediocre quality.

Tours According to Their Quality

1. **Independent Tours:** These are tours that individuals plan on their own or in a small group with their families or friends; these tours include flight plans, hotel accommodation and specific destinations, but give individuals the opportunity to organise their time use and schedules on their own.
2. **Hosted Tours:** These are tours which are organised for people who prefer resting instead of cultural activities. These tours usually include employees, namely hotel guides who work at the hotel establishments where the guests are staying, providing consultation and information services to the guests.
3. **Escorted Tours:** They are usually included in the outgoing tours. From the starting point of the tour, an employee from the travel agency or tour operators, preferably someone who can speak the language of the destination country very well, travels with the tourist group just like a member until the end of the tour.
4. **Guided Tours:** The biggest difference between guided tours from escorted tours is that there are not any representatives of the outgoing agency in the country providing tourists.
5. **Private Tours:** These are tours which are not open to general participation, and close individuals who are colleagues and know each other from professional environments usually participate in these tours.

Tours According to Distance

1. **National Tours:** ITC (Inclusive Charter Tour – Tours organised with a charter) is used as air transport and generally lasts for two weeks. It is organised to only one country or centre. The summer season is the peak period. There are also package tours regarding winter tourism.
2. **International Tours:** ITX(Inclusive Tour Excursion –Tours organised with scheduled planes) is used as air transport. It generally lasts longer than other tours. It is organised to more than one country or centre. There is not any specific peak period.

Tours According to Destination

1. Tours for one country
2. Tours for more than one destination
3. Tours for one city

Tours According to Purpose

1. **Relaxation Tours:** These tours are for people who go to holiday resorts or want to benefit from the sea, sand and sun in summer months. Excursions are limited. Almost all activities take place in the place of accommodation.
2. **Sightseeing Tours:** These tours are usually guided and not fixed. Trains, ships or buses are used for transport. These tours are usually organised to historical places or places with a natural beauty, and most of the tour is spent on the vehicles of transport.
3. **Educational / Cultural Tours:** These tours arefor people who travel with cultural, historical and scientific purposes. Tours including joining an art event, visiting an archaeological excavation site, and identifying the flora of a region are examples of this category.
4. **Religious and Ethnical Tours:** These are tours which are organised with the purpose of going on a pilgrimage.
5. **Adventure Tours:** These are tours which are organised for individuals who participate in the tour with the purpose of having an adventure during their journeys. Tours with the purpose of climbing, rafting, riding, safari, and hunting are in this group.
6. **Ecological Tours:** These tours are organised in a natural environment with the purpose of familiarising with rural areas.
7. **Sports and Recreation Tours:** These tours are usually organised for people who want to do sports such as cycling, tennis, kayaking, golf etc. and include visiting a specific park, casino or amusement centre etc.
8. **Optional Tours:** These tours are organised for the personal interests of individuals. They are also called private interest tours. These tours can be organised with the purpose of agriculture, archaeology, art, architecture, birdwatching, seeing castles and palaces, festivals, hunting, fishing, golf, music etc.
9. **Special Requirement Tours:** These are tours in which some handicapped people can participate, there are some special equipment, and which are organised specifically for the accommodation establishments.

It is also possible to make a classification according to the structure, function and service provided and chooses a target market. İçöz (2007: 78) evaluates this classification as follows:

According to the Service Provided

1. Airline ticket agencies
2. Tour agencies
3. Agencies representing tour operators
4. Car rental agencies
5. Transport agencies
6. Congress meeting agencies
7. Incentive tour agencies
8. Yacht agencies

Tours According to Structure

1. **Big Distribution Agencies:** They usually market the products of tour operators. They intermediate between tour operators and retail travel agencies.
2. **Industrial Business Agencies:** Big companies make an agreement with a travel agency for the travelling needs of their employees. The agency carries out all the procedures.
3. **Independent Agencies:** The agencies carry out all the procedures about the travelling. They usually sell tickets and package tours (Albustanlıoğlu, 2009).

Tours According to Function

1. **Outgoing Agencies:** Agencies with more independent customers compared to customer groups organise outbound tours to other countries. Customer reservations are confirmed by the accommodation facilities at least one month beforehand for these tours. The sending agencies function as a small-scale tour operator. These agencies contract with a foreign tour operator for their outbound tours to be organized and sell these tours as package tours to their local customers in their country. They also carry out the procedures regarding the passports and visa of customers. Local guides accompany customers in these outbound tours. Only A-group travel agencies can act as a sending agency in Turkey (Albustanlıoğlu, 2009).
2. **Incoming Agencies:** These agencies serve the tourist groups that foreign tour operators send to other countries in the country they are visiting. Receiving travel agencies, which could be named as local tour operators, carry out local services not as an intermediary, but as a representative and by proxy on behalf of the foreign tour operator. Accommodation establishments make room reservations and service sales to the receiving travel agency, too. The receiving agencies add some services to these sales and sell them either in bulk or by retail to the foreign tour operators. The most important quality of these tours is that they provide foreign exchange inflow to the country. (Albustanlıoğlu, 2009).

Tours According to Their Formation

1. Inclusive/charter
2. Pre-determined
3. Parallel
4. Incentive
5. Adventure
6. Business
7. Youth
8. Special interest
9. Third age (İçöz, 2007: 90).

Market segmentation is significantly important in forming the marketing mix and choosing the most optimal marketing strategy. Kozak (2008: 100) states that the most fundamental reason for market segmentation is to concentrate marketing activities on one point and to use marketing strategies efficiently. While there are different approaches in the tourism sector concerning market segmentation, the most commonly used market segmentation variables are "cultural qualities", "economical structure" and "the developmental level of the tourism sector"(Kozak, 2008: 105).

Growth Strategies of Travel Agencies

Growth strategies are strategies that are followed with the purpose of developing the establishments and increasing their share in the market. There are two main types which include intensive growth and integrated growth (İçöz, 2001, 194).

Intensive Growth

(1) Having a more efficient status in the market, (2) product development and (3) market development are among intensive growth strategies. Intensive growth has the purpose of expansion in the market.

- **Having a More Efficient Status in the Market:** This strategy aims to increase the market share of the travel agency. This can be achieved by drawing more customers from the existing markets.
- **Product Development:** Marketing managers present a new product for the existing market segment in this strategy. However, problems related to the allocation of resources and image make the creation of a new product in the market very difficult.
- **Market Development:** With this strategy, managers can achieve to increase the market share by searching for new markets and consumers. Besides, the popularisation of the product distribution channel can also be an effective market development strategy. Market development can also aim to move from the local market to the national market, and from the national market to the international market.

Integrated Growth

This strategy depends on the establishments to have an apparent control or ownership on the distribution channels. Integration is applied in travel agencies in two different ways: vertical – complementary – and horizontal. These are (İçöz, 2007:93):

- **Vertical Growth:** Travel agencies or tour operators could be integrated with the suppliers that they co-operate with in the tourism industry. This integration could happen in the form of a voluntary partnership or purchase. Big companies could also take control of small establishments by franchising. Compared to tour operators, vertical integration is more difficult for travel agencies. Tour operators have more advantages in integration because of their financial power and company portfolios. The vertical integration of a tour operator happens in the form of merging with tourism establishments which are not of their kind. In other words, vertical integration means the centralisation of the other manufacturers that provide the services on which tourists spend money such as airline companies, hotels, holiday resorts and shopping centres. While some tour operators purchase airline companies directly, others may choose to build a new airline company in their own structure. Huge tourism groups are formed with vertical integration. Some examples include Carlson, American Express, Preussag, My Travel, Accor and Groupe Kuoni (İçöz, 2007:93).
- **Horizontal Growth:** Horizontal growth happens with the integration of two establishments in the same line of work or one of the establishments purchasing another. The integration of a travel agency with another travel agency, and a tour operator with another tour operator is an example of horizontal integration. (İçöz, 2007:93).
- **Complementary Growth:** Another form of horizontal integration is among the companies which have a complementary quality to each other compared to the competitive products. A close link could be formed between the accommodation and transport sectors which are independent from each other for their customers. For example, airline companies could not take reservations for the regions with less accommodation opportunities in the past. Taking this need into consideration, airline establishments have built their own hotels or purchase existing hotels in the regions especially where touristic demand is high and there is a shortage of beds (İçöz, 2007:93).

Competitive Strategies of Travel Agencies

These strategies are completely about the competitors in the market, are carried out with different competition applications and applied in four ways. These include the market leaders, market competitors, market audience and niches (İçöz, 2001: 199).

Market Leader

Big and leading travel agencies in the sector (like Thomas Cook) apply this strategy. Market leader is the watchman and ruler of the sector, and in a way its constable, too. They are especially efficient in publicity applications and prices, and the expansion in the market provide important advantages for these establishments. These establishments must first endeavour to expand the market and then increase the market share by protecting it. To expand the market, new markets must be found, and customers must be made to benefit more from the services provided. For example, focusing on the meeting market including congresses, conferences, seminars in the off-season and even organising congresses and fairs with this purpose help the travel agencies appealing to the market with travelling purposes.

Encouraging existing customers to use the establishments more; providing certain discounts to existing customers or enabling these customers to benefit from some of these services free of charge are also among the methods used to expand the market (İçöz, 2001: 200).However, leading companies should be considered separately from the market leader.Market leaders are the establishments whose leadership is accepted by others as a result of their prices, product components, distribution strategies and promotion decisions. Pioneers, however, refer to establishments which attract attention just as much as the market leader, and which are meticulously evaluated by other companies regarding their location in the market they are in (Torlak & Altunışık, 2009). Another strategy that the market leader could use is to protect the existing market. In this respect, they need to increase the service quality of the existing services in the market and provide certain advantages to the customers constantly. Establishments creating brand loyalty in the market use this strategy successfully. Travel agencies working through franchising could also expand in the market by increasing their market share, and thus become the market leader. The market leader strategy, which is a defensive method, has a big share as the biggest company in the market and the most fundamental purpose of the leader is to protect its market share (İçöz, 2001: 200).

Market Competitor

This kind of strategy is applied through the adoption of the innovations in the sector, seizing the opportunities in the market and in the meantime taking some risks. Air transport is the sector where competitive strategies are most commonly used. The companies using competitive strategies usually produce similar and competitive products to those presented by the market leader and compete in the market efficiently by not only organising effective advertisement and promotion campaigns but also creating price advantages. Competitors carry out their strategies on especially by (İçöz, 2001: 200):

- Creating innovations or touristic products, and the distribution of these products,
- Providing organised and quality services,
- Conducting discounts on prices.

Competitors generally use the following strategies (İçöz, 2001: 200):

- **Frontal Attack:** It refers to the marketing communication activities by directly targeting the competitor. Since this method is costly, it is rarely preferred. The most important risk in this strategy is that the power of the attacked competitor could lead to failure. The brands applying this strategy usually choose methods such as intensive communication activities, price advantages, increasing the production capacity or developing the distribution channels (Çiftçi, 2016a).
- **Flank Attack:** This strategy aims at the leader's weakness areas and competes with them. For example, establishing hotels in the small population centres or holiday regions neglected by big hotels or travel agencies (İçöz, 2001: 201).
- **Encirclement:** It involves the targeting of the competitors' weaknesses and conducting marketing communication activities. It generally includes providing more qualified products than the competitors, developing the supply channels or targeting niche areas (Çiftçi, 2016a).

- **Attack without Confrontation (By-Pass):** Bypass involves carrying out marketing communication activities without confronting the powerful brands in the market. The brands in this position generally compete by presenting new products and technologies (Çiftçi, 2016a).
- **Guerrilla Attack:** In guerrilla attack, the market leader is competed with small and periodic attacks. It is the name of a marketing technique which is carried out extraordinarily at unexpected moments and times with different tactics. This marketing technique which is untraditional and involves different marketing techniques is being frequently used nowadays. The difference of this method, which actually has the same objectives with the other marketing techniques, come from the preferred techniques. Just like in every marketing technique, the objective is to sell a lot of products and profit from these products at the highest level (Çiftçi, 2016a). The most common guerrilla marketing tactic in the tourism sector is the websites prepared for the establishments and their products. Websites can be used as a common marketing instrument which can help consumers to obtain the information which they are curious about fast, in time and with current and low costs (Bozkurt & Şahin, 2015: 37).

Market Audience

This strategy requires being traditional and cautious. The establishments using this strategy do not take on some unnecessary risks and prefer to watch "the trend in the industry" if they can earn enough income. Market competitors are the most important threat for these kinds of establishments. This strategy, which is also known as "I am here, too" is quite popular in airline and car rental companies. When the market leader develops a new kind of service, the competitors in this area follow this product immediately and launch their own products (İçöz, 2001: 201). The establishments adopting the market audience strategy can attract new participants because of the opportunities that they present with profitable and attractive markets. Furthermore, the establishments adopting this strategy develop a new strategy by following the existing and leading establishments. In addition to this, the audience establishments can be classified as (1) fake audience, (2) copying audience, (3) imitating audience and (4) implementor audience (Torlak & Altunışık, 2009).

Niches

In niche marketing, establishments divide the market of interest into smaller segmentations, identify the gaps and fill these gaps with new products and services. Today, the demands, needs and expectations of consumers are constantly changing. These expectations gain momentum with the development of technology as well. It is of great importance for establishments to act strategically and meet these demands and needs in order to survive in the sector. Therefore, by niche marketing, establishments gain expertise on a specific market, customer, product or marketing mix; meet the demands and needs of small consumer groups whose needs have not been completely met; and get the opportunity to increase their profitability (Güreş&Akgül, 2010).

Although niche marketing activities are applied in the tourism sector, they are not very common. Just like there is in every sector, there are consumer groups whose demands cannot exactly be met in this sector, too. People have started to look for tourism activities which will appeal to their own special interests. Besides, while establishments acting towards mass tourism have difficulty finding customers, it gets easier to find customers for establishments organising tours for special interests. On the other hand, especially small establishments must specialise and appeal to customer groups who tend to create their own holidays by staying out of mass tourism; and gain expertise on areas which require a significant amount of knowledge such as congress and meeting tourism by organising special travel programmes targeting special interests to survive in the sector (Küçükaslan, 2009). For instance, tour operators mostly organise tours involving sea-sand-sun and historical values. A newly founded tour operator who does not want to exist in this group and compete with this group can create new segments and markets by organising tours of underwater tourism, some types of ecotourism or special adventure tours and so on. This way, they can draw tourists who are not sensitive about prices, who have a high level of income, and who can be qualified as well-educated; and exist in the market (Bozkurt & Şahin, 2015: 37).

Market Share Strategies of Travel Agencies

These strategies are applied according to the aimed location of the target market choice. Market share strategies are: (1) undifferentiated marketing strategy (whole market), (2) differentiated marketing strategy (multiple segments strategy), (3) intensified marketing strategy (single segment strategy), and (4) micro marketing strategy (to a local group).

Undifferentiated Marketing Strategy (Whole Market)

In undifferentiated or mass marketing strategy, establishments take the whole market as one unit or a mass, and act by ignoring the differences of the components forming it or by assuming they are similar to each other (Mucuk, 2007: 109). In this marketing strategy, establishments aim to serve the whole market or the widest segmentation of the market by presenting specific products or services. In this marketing strategy, establishments manage to save costs thanks to their scale economies. They can lower the costs of production, inventory and advertisement by presenting just one product or service.

For example, in the case that a tour operator perceives the market of a country as a whole, they need to meet the touristic needs of all the consumers in that country. They can provide product-based applications as well as tourism-based products, too. Öger Tourism has been carrying out similar activities in the German market for years (Kozak, 2008: 121).

Differentiated Marketing Strategy (Multiple Segments Strategy)

In this strategy, establishments choose two or more segmentation as target market and turn all their marketing efforts to develop a marketing mix for each segmentation separately (Mucuk, 2007: 109). This kind of a strategy aims to serve all the segments in the market. This quite costly strategy is generally used by the leaders of the industry. Establishments aim to take shares from all the customer groups in the market by applying efficient marketing mix and marketing methods for each market segment. Holiday Inn Hotels are one of the greatest examples of this application. There can be some valuable synergy in this strategy. Synergy means a mutual interaction among two or more work areas, production lines or functional areas which share a mutual resource for the establishment. The best example of synergy is airlines running some hotel establishments. For example, Pan-American airline company runs Intercontinental Hotels, TWA airline company runs Hilton International, United Airlines runs Westin Hotels, and Air France runs Meridien Hotels (İçöz, 2001: 203). In addition to this, the French Accor Hotel operates seven different brands of hotels including international luxury hotels, 3-star and 2-star hotels, and motels. This way, establishments have the potential to spread the risk in the sudden changes that can occur in demand changes (Bozkurt & Şahin, 2015: 103). Differentiated marketing strategy can be applied in different forms such as (1) differentiating the touristic products, (2) differentiating the touristic services, (3) differentiating the image, and (4) differentiating the distribution channel (Kozak, 2008: 121).

Intensified Marketing Strategy (Single Segment Strategy)

In this strategy, establishments choose only one of the identified segments in a market and focus all their marketing efforts on this segment with a single marketing mix. This strategy, which is especially beneficial in situations where establishments' resources and facilities are limited, refers to taking over a large part of a small market instead of appealing to a small part of a large market (Mucuk, 2007: 110). Several independent hotels and touristic regions adopt this strategy. These establishments especially appeal to markets seeking business trips and high-quality recreation facilities by presenting originally designed buildings and special services. The services they provide are different and original compared to other establishments. For instance, tourism establishments engaging in business and congress tourism activities invest in these kinds of services and use equipment and hardware appropriate for them (İçöz, 2001: 202). In the tourism sector, the products' having an abstract nature and being joint cause tourism establishments to use differentiated marketing strategies (Bozkurt &Şahin, 2015: 105).

Micro Marketing Strategy (to a Local Group)

In this strategy, whole market or one or multiple segmentations are not targeted. Instead, marketing mix is formed according to the demands of a local customer group or even an individual or an organisation (Mucuk, 2007: 110).

Life Cycle Strategies of Travel Agencies

Every product or service has a life cycle. There are different strategies to be applied in each life cycle of products or services. These cycles and the strategies are: -market introduction cycle, -growth cycle, -maturity cycle, -decline cycle.

Market Introduction Cycle

At this stage, the developed and manufactured touristic product is not yet well-known in the market. Therefore, sales rates are really low, and sales speed is too slow. First production cost is quite high because a significant amount of financing is required in the development and production phases of the touristic product. Therefore, there might be some damage at this stage. On the other hand, since the touristic product has just entered the market, there is no competition yet (Kozak, 2008: 149). İçöz (2001: 205) states that, since the costs of the promotion and other publicity done to establish a presence in the market are quite high in this stage, profitability is low. The product price is, thus, high and groups with high levels of income are targeted first. Some examples to this include hotels designed completely as suits and condominiums in the accommodation sector; Concorde planes in air transport; pre-packed salads of McDonald's in the catering sector, video check-out in hotels (through televisions in hotel rooms), theme parks, discotheques and resort conference centres (İçöz, 2001: 205).

At this stage, it is especially aimed to advertise the product, use it as a trial and create primary demand in a non-competitive environment. Since products or services are in limited numbers and produced with a high cost, and distribution is limited, the qualities of products are frequently changed, and the deficiencies and problems are tried to be solved at this stage. One of the following alternatives should be chosen while pricing: "high prices at the start" or "low prices at the start" (Mucuk,2007: 137). At the market introduction cycle, establishments use two different pricing strategy. These strategies are (1) taking the market resources strategy and (2) market penetration strategy.

Growth Cycle

At this stage, the demand for touristic products start to rise as a result of the publicity efforts. Therefore, the sales revenue also increases. The production costs of touristic products become fruitful. In addition to these, competitors for the touristic products in the market start to appear, too. On the other hand, the sales of touristic products get a boost and profit is made (Kozak, 2008: 149). The French accommodation facility Club-Med is shown as the best example for the application of this approach. It has opened new holiday resorts providing enough capacity for growth; has led towards new target markets involving adolescents and families with children; and gained new qualities to the existing holiday resorts. Facilities for babies and children are presented among these innovations (İçöz, 2001: 206).

Maturity Cycle

It is the stage where the sales speed slows down. There is satisfaction in the market. It is important for the establishments to take a sufficient share from the market and to preserve their obtained market segmentation as long as possible. In this period, touristic product manufacturers must initially bring an innovation to the product and then the market and marketing mix instead of leaving the product in its existing state (Bozkurt&Şahin, 2015: 173). Strategies to increase the business sales in this period are (İçöz, 2001: 2006):

- **Change in the Market Strategy:** In this strategy, establishments try to attract the customers of their competitors, searches for new target markets or make people who do not use a product use them. Another application is trying to increase the frequency of customers' product use with various reinforcements and incentive applications. Many airline and catering companies use this method.
- **Change in the Product Strategy:** The main purpose of this strategy is to create a new image to the target product by making some changes on it. For example, logo changes, colour changes, changes in the concierge services at hotels and express check-out applications are some applications that can enable such an image change.
- **Change in the Marketing Mix Strategy:** Changes in the marketing mix can also provide sale increasing effects. For example, hotels facing a saturated market can increase sales by finding new distribution channels such as travel agencies, tour operators and incentive travel organisers. Travel agencies can employ personnel working in return for a commission.

Decline Cycle

It is the stage where sales start to noticeably decline. It is the period when new service or products enter the market and there is a cutthroat competition. Customers start to leave the existing product. In this period, the establishments can keep up with the same loyal customers by encouraging them for a little more time (Bozkurt & Şahin, 2015: 173).Moreover, there are some criteria and conditions for tourism establishments to choose any marketing strategy especially in the life cycle stages. These criteria are (İçöz, 2001: 2006):

- **Business Resources:** When the resources and facilities of the establishments are limited, concentrated marketing strategies are quite effective. While a hotel endeavours to exist in a private market segmentation with limited financial resources, it can usually limit itself with a market segmentation in a geographical region.
- **Product/Market Homogeneity:** If consumers have similar needs and preferences, mass marketing is suitable for manufacturing establishments. Companies in the service industry get better results with intensive marketing strategy by manufacturing different products.
- **Competitive Marketing Strategies:** If competitive companies use solid techniques for market segmentation, mass marketing or undifferentiated marketing strategy is quite dangerous for the establishments. On the other hand, when competitive companies apply mass marketing strategy, a hotel can obtain a good amount of market share by using intensive marketing strategy.

While it is difficult to determine a product's life span, it should not be forgotten that the most important factor expanding or changing the life cycle span of a brand is consumers. Consumers' decisions emphasize and indicate when products or services should be released or pulled from the market (Bozkurt&Şahin, 2015: 174).

NEW TECHNOLOGIES USED FOR THE MARKETING STRATEGIES OF TRAVEL AGENCIES

New technologies which have been commonly used by travel agencies and tour operators in the recent years are as follows:

1. Central Reservation System (CRS)
2. Internet
3. WAP Technology
4. Call Centres
5. Digital Broadcasting

Central Reservation System (CRS)

In this system, it is aimed to reach information through computers. AMADEUS, WORLDSPAN and GALILEO are the most well-known central networks. It is possible to contact several countries in the world instantly with this system. Booking hotel reservations, booking flight tickets, and renting cars are only some of the services provided by this system. Central reservation systems enable the existing procedures to be carried out more efficiently instead of directly contributing to the marketing activities of travel agencies. AMADEUS is the most commonly used network among these. AMADEUS is a communication network which holds the flight information of 730 airlines, the hotel occupancy rates and pricing information of 29000 hotels and the information of 52 car rental companies in its memory and can keep this information up-to-date and ready to use (Korkmaz, 2001: 37).

Another communication network which is commonly used and whose centre is in Atlanta is WORLDSPAN. This system constitutes about 25% of Turkey's market. WORLDSPAN is used in 17880 travel agencies in 45 countries and provides its customers the opportunity to book directly from 30000 hotels, 430 airline companies and 40 car rental companies simultaneously (Yücel, 1998: 48).

GALILEO enables customers to reach their flight, car and hotel information and do their own reservations via the Internet through the webpages designed by travel agencies such as "viewpoint" and "Travelpoint.com". The system provides its users city and airport maps graphically. Despite all this, there are some problems during the use of these communication networks. These problems include not getting seats from airlines, problems related to the exchange rate and not being able to see the previously purchased tickets in the airline systems. These systems are seeking new methods both to overcome these problems and to prevent online applications from shortening the life span of these systems. In this regard, GALILEO's "travelpoint.com" and WORLDSPAN's "Worldspan Net" websites are only two results of this search (Korkmaz, 2001: 35).

Internet

In reality, the Internet is similar to the other central reservation systems technically. Just like the others, the Internet aims to reach information in the shortest time and way possible. However, the biggest difference is that it can function with more general subjects and a limitless number of users (Korkmaz, 2001: 38). In the recent years, the Internet has been reviewed as the most common distribution channel by tourism managements. Other than promotion which is among the most common uses of the Internet, the number of tourism establishments which accept reservations via the Internet and use this system commonly has significantly increased. In addition to this, there are some websites which interactively commercialise the products of the accommodation and travel establishments that they accept as members (Kozak, 2008: 172). The benefits provided by the Internet to travel agencies could be listed below (Kozak, 2007: 9; Kılıç, 2012: 48).

- Time saving,
- Easy access to information,
- Easy access to information by customers,
- Providing a variety of options to the customers,
- Recognition and contributions to the image,
- Access to new markets,
- Knowledge acquisition,
- Interactive access to work partners,
- Cost saving,
- Variety of services,
- Product personalisation,

- Simultaneous (interactive) access to customers,
- Simplified procedures,
- Easy payment,
- Acquiring new business partners.

WAP Technology

Developed in the late 1990s by the Ericsson company, the WAP (Wireless Application Protocol) technology was created for GSM mobile telephone users to reach the Internet. It is not possible to reach all the webpages on the Internet via the WAP system. Only the webpages designed specifically for the WAP system can be viewed with the WAP system. Mobile phones need to support this system for WAP to function. The most important purpose of the WAP system is to encourage people to do mobile shopping. For example, some airline companies send text messages to their customers' mobile phones and inform them about flight delays to prevent tiring waits at airports. American Delta and United Airways are leading companies in this regard. Similarly, passengers can also do their check-in via e-mails on their mobile phones and receive the necessary flight details. Turkish Airlines and Swissair are among the companies which can provide this service. While passengers who have a mobile phone compatible with WAP can do their check-in for a previously booked flight on their mobile phone, they can see the exact take-off time of their flight and their entrance gate (Korkmaz, 2001: 69).

Call Centres

Call Centrerefers to a high capacity service centre designed to provide information, marketing, sales, technical support and post-sales services. Another view is that, it is a central system which works based on a central database via automatic telephone forwarding system and conducts business via telephone. In respect with this general definition, this system is generally used in the following areas (Korkmaz, 2001: 69):

- Large-scale tele-marketing centres,
- Funding organisations,
- Information offices,
- Outsourcing companies,
- Reservation departments of airways, hotels and travel agencies,
- Retail companies doing sales with catalogues,
- E-marketing companies.

Digital Broadcasting

Common all around the world, this technology has started to be used in the travelling sector, too. The most common examples can be seen in England. Digital broadcasting is done through televisions. Since a number of channels are given opportunities via digital broadcasting, the opportunity to broadcast on many different subjects has come along. This is the starting point of carrying out tourism marketing activities through digital broadcasting. The most important qualities of digital broadcasting are that it provides a lot of channels to be watched and it has a very advanced level of picture and sound quality.

Besides this, it enables special video broadcasts and the pictures on the screen can be watched in different sizes. In this respect, it enables advertisers to be able to reach a more sophisticated and specific audience. In other words, this system makes advertisements more efficient. Furthermore, this system has the interactive quality just like the Internet which makes it easy to get responses from the population reached (Korkmaz, 2001: 73).

SALES TECHNIQUES USED FOR THE MARKETING STRATEGIES OF TRAVEL AGENCIES

Travel agencies and tour operators have important functions in the delivery of the products and services of the establishments and especially accommodation and transport establishments in the tourism sector to the consumers. In this respect, agencies need to have some expertise to increase their sales and try single sales techniques. The following are the common sales techniques used by agencies (Yalçın, 2017: 11).

- **Direct (Counter) Sales:** It is oneof the most common methods used among the sales techniques. Since customers are informed of several travelling options and tend towards package tours in direct sales, it is important for the sales staff to increase sales by giving correct advice and exact sales information.
- **Sales by Mail:** Sales by mail is a sales technique in which establishments send their printed materials including their products to their potential customers via mail (letter). This technique can be shaped according to the personal needs of the customers and is usually used for businessmen, targeted customers and some private groups. Flexible and rich opportunities could be presented to the customers with this sales technique (Palmer, 1998: 285).
- **Sales via Telephone:** With the development of technology, concepts related to marketing and sales such as tele-marketing have appeared. Unlike traditional call centres which provide the services of post-sales support, problem solving, reservation and issuing tickets, consumers are contacted, and sales activities are carried out directly in tele-marketing (Gelibolu &Özsoy, 2013: 481).
- **Sales in Electronic Environment:** Sales in electronic environment or electronic commerce (e-commerce) refers to the production, promotion, sales, insurance, distribution and payment processes of goods and services through computer networks. Electronic commerce consists of three stages: (1) advertising – market research, (2) ordering – payment, and (3) delivery, and one or all of the commercial processes should be carried out on the electronic environment.

The Ministry of Economy defines electronic commercial instruments as technological devices that eases the commercial processes of those who do business with each other (telephone, fax, television, computer, electronic payment and money transfer systems, electronic data interchange systems (EDI) (Yalçın, 2017: 12).Establishments can deliver much more information to their customers systematically with a lower cost in a shorter time thanks to the networking used for the connections between computers, the Internet, intranet and extranet (Kırcova, 2005: 11). Commercial websites on the Internet choose to determine their strategies by contacting their customers directly and getting the most information from them on a personal basis (Yalçın, 2017: 12).

- **Other Sales Techniques:** It is possible to come across many different sales techniques other than direct sales, sales by mail, telephone and in electronic environment. The other sales techniques are summarised below (Hacıoğlu, 2006: 192).
- **Sales in Supermarket Centres:** It is a sales technique developed in Europe and America. Package tour sales can be seen in large-scale shopping centres. These sales are usually carried out at the offices of the travel agencies built in shopping centres.
- **Sales in Banks:** Travel organisers which are the partners of government banks sell their products to their customers in Europe and Australia.
- **Syndicates (Clubs, Unions):** Unions, organisations or travel agencies with non-profit purposes sell touristic products or tickets for people who especially join social tourism themed package tours.
- **Sales Networks of Transport – Moving Establishments:** This refers to the sales of airways and railways in Europe by opening their own sales offices and selling their package tour products. An example could be the booking agency of Air France company. It can be seen that the booking offices of airway companies in the airports in Turkey function as travel agencies providing services like car rental, booking hotels and transfer.
- **Travel Supermarkets:** Except for traditional supermarkets where daily shopping is done, establishments acting like a travel agency sell all kinds of services regarding travelling in France and Germany.
- **Sales on a Screen (Telematic Sales):** In this sales technique, which became common in France, travel and package tour details are presented on televisions or cinevision screens and the sales of the preferred package tour is carried out at the same time by the sales assistants in the same saloon. Customers can also buy the travel and package tours that they see on any screen by telephone or directly going to the travel agency.

SOLUTIONS AND RECOMMENDATIONS

Travel agencies and tour operators adapt different strategies with various purposes such as existing in the market efficiently, continuing their existence, taking on a social responsibility or maximising their profit. The marketing strategies of travel agencies should first be consistent with their mission and vision. While deciding on their marketing strategies, travel agencies and tour operators need to conduct a situation assessment after they identify their mission and vision. As a result of this situation assessment, the strong and weak aspects of the agency should be detected, and the opportunities and threats that these situations will cause in the future should be identified. In relation to these findings, the agency should set short-term, medium-term and long-term objectives. Travel agencies should adopt the most suitable marketing strategies, plans and policies for these objectives. Moreover, the other establishments providing services in the tourism sector, conditions of competition and target audience affect the action plan to be chosen. Even though this study is about marketing strategies, it is not possible to isolate the resources that the establishments have for reaching their objectives from the topic.

Marketing strategies are evaluated taking the effects of many different variables into consideration. These are consumers, the structure of the market and industry, the location of the company in the market, marketing facilities and the resources of the establishments (İçöz, 2001: 192). Target audience, the structure of the market and conditions of competition affect the strategies that the travel agencies should follow. These strategies are (1) market segmentation strategies, (2) growth strategies, (3) competitive strategies, (4) market share strategies, and (5) product life cycle strategies (İçöz, 2001: 195). Travel agencies and tour operators need to do a market analysis before deciding on their marketing strategies and determine the target audience that they will serve. To be able to use the business resources more effectively, the heterogenous market should be homogenised. In this respect, agencies could take the most preferred tendencies into basis. The strategies used to determine the target audience are: tours according to their age, accommodation type, economy, quality, distance, the region visited, purpose, service type, structure, functions and formation. Agencies adopting one or several of these segmentation criteria should adopt the strategy which fits their purpose best. Some of these strategies include: growth strategies, competitive strategies, market share strategies and life cycle strategies (İçöz, 2001: 195). In addition to the preferred marketing strategy, the technologies used by travel agencies and tour operators in the recent years have reinforced the effects of these strategies. Some of these technologies are central reservation systems, the Internet, WAP technology, call centres and digital broadcasting. These technologies strengthen the synergy of marketing strategies. On the other hand, the efficiency of sales could be increased with sales techniques such as counter sales, sales by mail and sales by telephone; and long-term, trust-based and consistent relationships could be developed with the target audience.

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KEY TERMS AND DEFINITIONS

Marketing Strategy: A marketing strategy is a business's overall game plan for reaching people and turning them into customers of the product or service that the business provides.

Sales Techniques: Sales techniques are the methods that sales professionals use to create revenue.

Tour Operator: A company/agent that makes arrangements for travel and places to stay, often selling these together as package holidays (travel and accommodation are booked for the tourist).

Chapter 17
E-Marketing as a Tool to Achieve Competitiveness in Travel Trade Industry

Himanshu Malik
Chandigarh University, India

Minky Sharma
Chandigarh University, India

ABSTRACT

E-marketing allows one to do business by using online sources. This internet source is also helping the travel and trade industries in getting the growth in their business or if the business man of small-scale industries were made aware of this then they can achieve much more in their travelling business along with the valuable customers. The chapter aims at identifying components of e-marketing that provide competitiveness in travel trade industry and address the use of e-marketing components that provide competitiveness in travel and tour industries.

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INTRODUCTION

E-Marketing is a technique or set of strategies with latest technology of online systems to attract the target market customers. Now a day's customers are so conscious in spending their money with easiness that they need everything at their doorstep moreover if a business person needs to attain growth in their business, they also need to use the latest strategies, technique of Internet to attract the market customers. Customer use the mode of internet with the help of various devices like Computers, laptops, Tablets, Smart Phones etc. to excess various websites on internet related to their needs and preferences. Therefore, every business seems to be working towards the internet marketing, as it is the need of today's world. Internet gives us different economical ways to promote their business as we can see the different modes of internet for availing lots of different facilities of Hotels and aviation industries. Consumers are turning to the internet to take advantage of ease of booking and comparative pricing. In India 95% of consumers search online before making a travel purchase. It also indicates that majority of consumers are comfortable with online ticket booking, but tour packages and hotels are still booked offline in India. It indicates that there is a gap between expectations of consumers and actual facilities promised by hotels when booked online. Best motivation for the customers to travel by booking a trip which is unplanned along with the greater discounts will be only online mode.

According to Octane Marketing Pvt Ltd (2015), 41% consumers make a purchase after receiving a promotional/discount offer over email and 25% consumers make a purchase after receiving an offer over SMS. The top five online activities which Indian consumers mostly perform includes following percentage Email checking (74%), web browsing (73%), Facebook (70%), using maps/directions (64%) followed by games (60%), travel search (82%) and travel booking (80%).

E-Marketing is the Mixture of E-commerce, E-business and all the services which is provided to the customers with the help of Internet is considered to be the part of E-Marketing. Kaur et al., (2015) in their research they expressed the buying and selling of products, services on the internet and another online environment. It is also known as Web marketing and considered to be the part of management process as its main aim is to build strong relationship with the customers which includes identify unmet needs, producing products and services to meet those need and pricing, distributing and promoting those products and service to produce a profit. They also discussed about CRM how it is playing an important role as a component of e-marketing. As compare to the traditional marketing E-Marketing is proved to be the useful and result oriented in future e-marketing provide the efficient websites which is easy to use for common people and then e-marketing will be increase. According to Mpinganjira (2014) they have discussed about the relationship marketing strategies they have collected data for the same in which their findings show that online repeat purchase intentions are strongly driven by customers 'as compared to the shopping from shops, Malls and other sources than internet. They have explained about the Customer satisfaction with an online retailer was found to be positively influenced by a number of relationships building related factors, which includes personalization, ease of communication as well as assurance of customer privacy. They have findings to make the online retailers aware about the process of selling and increasing sales by these sources of Internet keeping in view all the factors in loop.

Morrison (1996) in his study discussed the accelerating push for Partnership between hotels, airlines, restaurants, travel agents, and other is central focused of the research done by them. They have discussed carefully and organized five parts in line along with the hospitality and travel marketing system model. They have clearly explained marketing and its evolution in tourism industry and all approaches available to hospitality and travel organization. Marketing plan is developed and implemented in the system according to the internet. In their research they have identified the product services and service quality, packaging, programming, distribution channels, communications, advertising, sales promotion, personal selling, public relations and publicity, and pricing as important aspects of competitiveness. According to the Britton (1979) the inability of the tourism industry to represent destinations as real places due to themes and biases in advertisements, travel journalism, and the travel trade press are examined. The pictures, themes or sightseeing etc. shown in advertisement for marketing got distorted when the tourists found nothing like same to the advertisement shown before. So they basically want to express the limitations related to the false advertisement about the travel trade agency and if this will continue than it will definitely create a matter of contention while implementing the E-marketing tools in travel trade industry.

Rehman & Elahi, (2013) elaborated in their study about an overview of evolution of E-Marketing in India and consumers perception towards E-Marketing. They stated as the e-marketing can be achieved only after applying the digital technologies, In the present work an effort is made to access the potential of Internet Marketing in India in consonance with the various environmental factors. There are various techniques that can help the marketers to boost their business harvesting by using this internet sources and digital technologies. It is also clearly discussed in the paper that E - Marketing is one of the most effective ways to keep in touch with customers. Which is generally cost-effective if done properly, and it also help in building the brand awareness and loyalty. The dawn of the internet era opened up amazing new possibilities. India has also joined the bandwagon and the numbers themselves do all the talking. According to their data collection in their research paper they have shown the following data such as, the penetration of active internet users has grown from 2.13 percent in 2010 to 3.7% in 2012.The latest statistics reveal that 400 million people access internet regularly in India and that is jump of 700% in last six years. The number of claimed Internet users has seen a growth of 16 per cent over last year. Internet marketing in India is a potent combination of technology and marketing acumen which has opened a new pathway of today's marketing. As they have mentioned also that Companies have changed their traditional business strategies into online marketing and have become full-fledged service providers with the facility to offer a full range of ecommerce products to suit customer needs and taste at any time. Suginraj (2017) states that most of people spend their precious time online in India every year, and the digital tools and sites they use play an ever-growing role in their lives. Now Indian consumer is spending more time on social media and internet surfing. Thus the visibility of the products with the help of online sources and digital mediums were used more and the traditional techniques were avoided now a day. They have discussed Digital marketing main growth comes from social media, people nowadays spend their time on social media and that is a plus point for marketing, there are more than 82 million monthly active users for Facebook and in India it is expected that the nation will have the world's largest Facebook population by 2017. Day by day growing Digital Market in India is an evident that the Digitization is taking place with a high speed. E-commerce website are providing all the goods and services through online portals online today. In India E-Commerce is growing at an astounding rate and it is expected to account for 1.61% of the global GDP by 2018. They also have explained about the Digital marketing industry in India is spread to almost all the business sectors. Some of the applications of E-Marketing are shopping and order tracking, online banking, payment systems and content management. Digital marketing industry in India is a booming career today. In a country with a rapid growth economy, it is expected to have a very high significant growth in Digital marketing career. This hike in the E-marketing is really creating growth of the Country like India.

In India E-Commerce is the largest growing and most profitable for new business start-ups. The following data shows the detail of E-Commerce and Advertising Facts from India as India's Digital advertising market has grown at 33% annually between 2010 and 2016. E-Commerce in India is currently at 2 Lakh Crores and is predicted to grow 5 Lakh Crores in 2017. In India 77% of online users buy products exclusively on Social Media.8% of Indian Internet Users has purchased at least one product online and by 2019 it is expected to grow by 64.4%. 59% users shop on tablets, 69% shop on Mobile devices, and 38% shop on weekly basis. 50% of shoppers buy products online based on recommendation through social media networks and 74% of customers rely on social media for making their purchase decisions. The sale of physical goods via digital channels in India amounted to 16.8 Billion U.S dollars in revenues.

REVIEW OF LITERATURE

Digital marketing which is considered to be one of the elements of E-Marketing. The research done by Gibson (2018) to the mainly gives review about Making a strategic shift to client-centered marketing strategies, provide businesses the opportunity to engage in a new era of innovative marketing practices, that use digital marketing to meet their primary marketing requirements. In his findings he explained that this Digital marketing concept provide companies with valuable tools to target a larger audience, using a combination of emerging technologies and some aspects of traditional marketing. And with the help of digital marketing strategies we will have increase number of target market customers.

Kim (2018) expressed his views in relation to the latest trends in the E-Marketing such as: Increased Regulation, Email Rendering, Device Friendly, Intelligent Personalization, and Sophisticated segmentation, Subject Line Effectiveness, Writing for Emails, Deliverability, Code like its 2018, and Marketing Automation. These trends helps to keep all types of businesses up-to-date with the latest approaches to email marketing techniques which help every business adopt these trends .The author has explained various trends which includes that There has been an increased focus on legal regulations within the email marketing world then the email of confirmation is sent to the customer at the time of dispatch which makes the customer so that he should feel the sense of responsibility by the organization with the help of e-marketing similarly he have explained various trends in regard of the E-marketing. Hanke, (2016) explained that the development brought significant changes to the airline business, travel markets, and consumers. Today, airlines worldwide not only use e-commerce for online marketing and selling but also as a platform to offer unique services and capabilities that have no counterpart in the physical world explained few points as a part of essentials that hoe e-marketing works in airlines. This research appreciates the ramifications of airline e-commerce in certain corporate areas and to take effective action for a successful e-commerce strategy. Furthermore, Lepeshkin, et al (2016) discussed about the dramatically pace and significantly impact of changes in the behavior of Customer and business. They explained that the businesses have adopted various strategies of E-Marketing for the web. The authors discuss e-marketing is an international context which develop a framework that will allow researchers and managers to understand the impact of country level effects on e-marketing strategies. As they have focused upon the international e-marketing. They includes the revolutionary change in the strategies of E-marketing as international e-marketing strategies are fundamentally changing, and will continue to change, marketing thought and practice in international markets. Kaur et al (2015) in their research, have explained about the E-Marketing basis which is also known as Web Marketing and it is also considered to be one of the important components of Management. Their main motive is to consider the customer as a king pin for the market so creating a good relationship with customer is one of the important aspects of E-Marketing. Customer relationship management CRM worked as a tool which increased the use of e-commerce which makes CRM a necessary component. E-marketing has a benefit of 24 X7 Services to the customers along with the sales and maximum profits to the business. E-marketing websites provide the flexibility, efficiency of work, to the organization and also provide the better security of e- paying their taxes, licenses, fees etc. In future E-marketing provide the efficient website Which is easy to use by the common peoples so this is the main reason why all parts of the organization should co-ordinate their activities to ensure that customer needs are met efficiently, effectively and profitably. The author has explained the various elements of Marketing in relation to E-Marketing such as Product, Price, Place and Promotion. Mpinganjira (2015) discussed about Online retailer Customer satisfaction which was found to be positively influenced by a number of relationships building related factors, including personalization, ease of communication as well as assurance of customer privacy. They have explained about the online environment which makes it difficult for retailers to differentiate themselves on the basis of traditional elements of the marketing mix. The content was explained by putting the content of Africa as an example for implication. With the rapid penetration of the Internet in Africa is quickly transforming not only the way people interact and search for information, but also how business transactions are conducted. This business of Electronic is helping every Organization to diversify their distribution channels and the different mode through which growth of customers can be increased. They also have discussed the figures of 1 trillion US dollars after the sales by E-Commerce source at the end of 2013 and similarly they have increased Manifold. Moreover, Line & Runyan (2012), purposes of doing research on the Hospitality Marketing in recent trends and future directions identifies the relevant trends and gaps in the literature on basis of their reviews on the research topics, industry focus, and analysis technique as well as on a number of other methodological criteria. They have discussed about the recent significant trends and methodologies which are synthesized and given a specific direction for proposal of future trends. As mentioned in their research they stated that the trends which the market was following need to be changed as they also mentioned that since that time it is observed that there are dramatically changes are taking place in the marketing strategies and trends such as E-business, E-commerce playing great role in this area, as they have mentioned the Increase of Globalization after the 11 September, 2001.The purpose of their research was twofold, the first is, to find out the relevant similarities and distinctions among trends was discussed, along with the future research directions will be proposed. Second is to synthesize the research which will emphasize the most popular topics and trends.

Hatem (2010), In this research the main objective was based on E-Marketing, Electronic Commerce, Electronic marketing, Internet marketing, the web, ICT adoption along with the research how to explore, analyses and develop clear understanding about the various researches based on E-Marketing methodologies implemented in E-marketing published articles of 2003 and 2010 .And various methodologies for which they felt is very difficult to express as E-Marketing concept is most of the times is considered as an Unclear concept for the both Researchers and the Practitioners, by missing it with various concepts related to E- commerce, E-business etc., As these two terms have their own meaning with their own details given by various researchers And they have their relevant research material related to various journals. But on other hand, they also have adopted proposed internet marketing framework according to which they have taken details from various articles like Marketing journals, Economics, business and management journals, Information systems (IS) and information technology (IT) journals. So, they have considered his framework and methodology which is implemented according to the Hanson (2001). Similarly, Law et al (2009) envisaged that the tourism and hospitality industries have widely adopted information technology to reduce cost, enhance operational efficiency and importantly to improve service quality and customer experience. They talked about the grouping of findings into categories of consumer, technologies and suppliers which shed the light on the evolution of IT applications in tourism and hospitality industry and they also discussed about that the IT is becoming critical for competitive operation of the tourism and hospitality organization as well marketing it on global scale for managing and distribution. Their publications were grouped into three main categories namely customers, technological development and suppliers along with their different findings in relation after applying the IT tools.

Chaffey & Dave (2007) stated that Antithesis to early predictions it was clear that most of the small business organizations had very less impact of E-Marketing. These businesses do not understand the benefits of E-Marketing or E-business and nor these small businesses motivated to get engaged for the same. They had given the Importance Performance Analysis (IPA) for evaluating defining the strategies among all small organizations and which help them to make resources recommendations, as result they showed the focused motivation customers are most important in e-business and putting profit ability in least importance. This results in small organizations getting more potential and sophisticated uses in the early stages of implementing the e-business. On the basis of reviews they had identify the nineteen specific motivations for engaging in the E-business. They also have demonstrated the value of IP analysis in evaluating the E-business strategy and to make business recommendations regarding priorities and resource allocations. Gommans et al (2001) mentioned the rapid growth of E -commerce and on-line consumer shopping trends, along with the importance of building and maintaining customer loyalty in electronic marketplaces which they have focused in their marketing theory and practice. They also presented the various Implications e-marketing practices and future research directions for presentation of the e-loyalty.

As there research is moving towards building and maintaining the brand loyalty to establish sustainable competitive advantages. As in traditional times the businesses follow premium pricing, greater bargaining power with channels of distribution, reduced selling costs etc. for maintaining brand loyalty. Along with it they have discussed about Business to customer, e-commerce has magnified the importance of visiting a loyal visitors based on e-commerce websites (e-loyalty) they approached to generate a large enough customer based on "lifetime revenue potential" from each loyal customer. The main objective for this research by the researchers was to interpret traditional brand loyalty literature in the context of online buyer behavior to bring out the similarities and differences between traditional brand loyalty and e-loyalty.

In the background of the review the present research is trying to achieve following objectives.

- To identify components of E-Marketing that provide competitiveness in travel trade industry.
- To identify the use of E-Marketing components that provide competitiveness in travel and tour industries.

RESEARCH METHODOLOGY

The geographical area of this study is confined to Chandigarh tri-city. The research is based on both Primary and secondary data. In which the sources of secondary data was collected from various articles published by researchers of E-Marketing in general and travel trade specifically .The study is confined to the area of Chandigarh tri-city considering it as universe for the study while the population consisted of travel agencies operating in the region. Top 100 travel agencies working in Chandigarh tri-city were picked up from JUSTDIAL search engine as population out of which 30 are selected as sample for the study. The Primary data was collected from these 30 travelling agencies which stratified into three categories Chandigarh, Mohali and Panchkula we have selected 10 each from all three regions. The collected data was subjected to statistical test using SPSS for analysis.

DATA ANALYSIS

The following data is collected from different travel Agencies of the Tri-city which was analyzed and shown as below:

DEMOGRAPHIC PROFILE

In the Demographic profile the data is presented in tables as shown below for the demographic profile of the respondents of E-Marketing.

According to the questioner answered by the respondent the responses were shown In the table 1 shown above which is related to Age of Organisation which shows that the age between 0 to 5 years is having the frequency of 12, when the age is lying between 5 to 10 years frequency is 15, when age is in between 10 to 15 years frequency is 11, in next step when age is 15 to 20 years frequency is 4 and finally when age is more than 20 years the frequency shown is 3.

According to the questioner answered by the respondent the responses were shown In the table 2 shown above Which is related to types in which the maximum frequency is of Local Region, 16 for the MNCs and the International frequency lies on 12.

As per the responses to questioner by the respondent are shown In the table 3 shown above Which is related to the Financial values of the organisation surveyed in which we analysed that the highest frequency lies between the range of 5 to 10 lakhs after that between 10 to 15 lakhs after it the frequency 9 is for 15 to 20lakhs after which lies up to 5 lakhs with frequency of 8 and with the lowest frequency of 5 lies in more than 20lakhs.

Table 1. Age of the organisation

Age of the Organisation					
		Frequency	**Percent**	**Valid Percent**	**Cumulative Percent**
Valid	0 to 5 years	12	26.7	26.7	26.7
	5 to 10 year	15	33.3	33.3	60.0
	10 to 15 years	11	24.4	24.4	84.4
	15 to 20 years	4	8.9	8.9	93.3
	more than 20 years	3	6.7	6.7	100.0
	Total	45	100.0	100.0	

Table 2. Types of organisation

Type of organisation					
		Frequency	**Percent**	**Valid Percent**	**Cumulative Percent**
Valid	Local	17	37.8	37.8	37.8
	MNC	16	35.6	35.6	73.3
	International	12	26.7	26.7	100.0
	Total	45	100.0	100.0	

Table 3. Financial value

Financial value					
		Frequency	**Percent**	**Valid Percent**	**Cumulative Percent**
Valid	up to 5 lakhs	8	17.8	17.8	17.8
	5 to 10 lakhs	12	26.7	26.7	44.4
	10 to 15 lakhs	11	24.4	24.4	68.9
	15 to 20 lakh	9	20.0	20.0	88.9
	more than 20 lakhs	5	11.1	11.1	100.0
	Total	45	100.0	100.0	

Table 4. Monthly turnover

Monthly Turnover					
		Frequency	**Percent**	**Valid Percent**	**Cumulative Percent**
Valid	up to 1lakhs	13	28.9	28.9	28.9
	1 to 2 lakhs	7	15.6	15.6	44.4
	2 to 3 lakhs	8	17.8	17.8	62.2
	3 to 4 lakhs	12	26.7	26.7	88.9
	more than 4 lakhs	5	11.1	11.1	100.0
	Total	45	100.0	100.0	

According to the questioner answered by the respondent the responses were shown In the table 4 shown above which is related to the Monthly turnover of the organisation surveyed in which we found that most of the organisations are lying between up to 1 lakhs with frequency 13 and in it the lowest frequency is 5 where the turnover is more than 5 lakhs, the monthly turnover of 2 to 3 lakhs have frequency of 8 and the turnover lying between 3 to 4 lakhs is having the frequency of 5.

Further the data collected for the uses of E-Marketing with different respondents is as follows In the table 5 shown above states that the Ranking of E-Marketing components as a tool to achieve competitiveness in travel trade Industry, the importance of different variable has been given different ranks so that it can be easily identify which variable is consider as a most important variable among the all variables surveyed. Alongside the table also shows how these components are ranked for their use by the respondents.

As out of all different variables from the questioner of survey the variable Dependability on technology is considered to be the most important tool of E-Marketing and after that the Universal Accessibility is marked as second most important variable as a tool of E-Marketing, On the third rank Maintenance cost is considered as its tool, on fourth the Responded states that E-Marketing gives us faster response, On fifth rank the variable is Competition through Globalization, on sixth rank the variable is Exposure of Product, On seventh rank the variable considered by the response of respondents is Reduction in cost, In further discussions it is clear that the variables which are after seventh are considered to be the least important variable in E-Marketing, On eighth rank the variable is increase interactivity, on ninth rank it is High transparency the agencies feels E-marketing carry transparency of data, on tenth rank Increase ability to Collect data is with its response, on eleventh rank Possibilities variable is considered as least important, on twelfth rank the respondents feel that it carry low risk and the least of the above two the variable of Security and Privacy is considered as E-Marketing is not safer source of doing business from different point of views in organization.

RESULTS AND DISCUSSION

The results of the analysis of data collected for this research done on the topic E-Marketing as a tool to achieve competitiveness in travel trade Industry came up with the following points:

A total of 13 components of E-marketing are identified as important for providing competitiveness in travel trade industry. These components are than ranked for their importance on the basis of mean of responses give by the respondents which has resulted in *Dependability on Technology* being the most important component for providing competitiveness in travel trade industry followed by *Universal Accessibility* and *Maintenance Cost*. While on the other side *Security, Privacy issues* are ranked last for being important component providing competitiveness in travel trade industry.

Table 5. Ranking of e-marketing variables for providing competitiveness

S.NO	Variable	Importance		Usage	
		Mean	Rank	Mean	Rank
1	Reduction in cost	3.842	07	3.945	05
2	Increased ability to Collect data	3.644	10	4.320	03
3	Faster response	3.911	04	3.740	09
4	Low Risk	3.288	12	3.888	08
5	Possibilities	3.533	11	4.500	02
6	Increased Interactivity	3.800	08	4.960	01
7	Exposure of Product	3.844	06	3.911	07
8	Universal Accessibility	4.480	02	3.520	04
9	Security, Privacy issues	3.155	13	2.780	13
10	Competition through Globalization	3.888	05	2.960	12
11	Dependability on Technology	4.500	01	3.533	10
12	Maintenance Cost	3.945	03	3.288	11
13	High Transparency	3.765	09	3.911	06

When the components were ranked for being the most used component in order to provide competitiveness in travel trade industry the study resulted in *Increased Interactivity* being the most used component to provide competitiveness followed by *Possibilities* and *Increased ability to Collect data* while *Security, Privacy issues* ranked last for being used to provide competitiveness in travel trade industry.

LIMITATION

The Research is Confined to Chandigarh region (Tri-city) only and it is Limited with the Online resources of Travel and trade agencies which are only collected from the online resources as it doesn't cover the all travelling agencies which are not yet registered in online resources which are ignored in the research as a universe.

SUGGESTION

From the Limitations and the research completed the following suggestions can be considered as the source of suggested points:

1. Firstly, Small scale industries should focus on the E-Marketing.
2. Accessibility of the e-Marketing should be increased
3. Source of security and privacy should also be maintained on higher priorities.
4. Awareness regarding the E-Marketing benefits should be inculcated
5. Making Travelers understand to more concentrate on getting the prime customers with minimum expenses by the E-Marketing along with the benefits of E-Marketing as a tool of competitiveness in travel and tour industry

CONCLUSION

As E-Marketing is Electronic Marketing (E-Marketing) can be viewed as a new philosophy and a modern business practice involved with the marketing of goods, services, information and ideas via the Internet and other electronic means. In reference to the research done on the topic E-Marketing as a tool to achieve competitiveness in travel trade Industry, this is explained in detailed with the various references from the different research papers or the journals by various researchers as most of the states the Small Business Enterprises (SBEs) do play a major and important role in today's world economy, and they are recognized as one of the main contributors to economic, development and employment growth, with the help of E-Marketing the small scale business can easy grow and get the cluster of good and reliable customers along with it the researchers have explained about the various use of Information technology to use in the E-marketing. Which means best source of considering the Business growth is with the help of this E-sources which includes the E-Commerce, E-Web, Digital marketing etc. We can also say that the E-Marketing increases the Approach of customers and the businessman towards growth of individual marketing.

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Chapter 18
Sustainable Tourism Development in North India:
Perception of Tourism Stakeholders

Vivek
Kurukshetra University, India

ABSTRACT

The endeavor of the chapter is to inspect the perception of residents, tourists, hoteliers, and travel agents in respect to sustainable development of tourism and to study the role of tourism stakeholders in promotion of sustainable tourism in North India and to suggest the measures for promotion of sustainable tourism in the study area. Based on a survey of initially, 71 items emerged, but after survey, only 43 items were found significant. Likert-type scale values assigned, 1 to "strongly agree," 2 to "agree," 3 to "neither agree nor disagree," 4 to "disagree," and 5 to "strongly disagree," was provided to the subjects for them to use in indicating the importance of each of the 71 general sustainable tourism development statements. Of 2300, only 1380 (60%) respondents completed the questionnaires and were valid. The data are analyzed with the statistical package program for social sciences (SPSS 12 for Windows). The basic analysis and tests utilized in this study includes descriptive-statistics analysis, factor analysis, mean and bivariate statistical procedures, etc. The study provides a strong indication that there are significant differences among tourism stakeholders on sustainable tourism development parameters. This research highlights the changes that sustainable tourism development has brought to the community and presents the various perceptions of stakeholders in this particular setting. The research demonstrates that to plan for more sustainable forms of tourism development, the subjective perspectives and the roles of all stakeholders need to be understood and integrated into a responsive planning framework.

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INTRODUCTION

During last three decades the many tourism researchers (Dewhurst & Thomas, 2003;Hardy et al., 2002;Mohinder and Arvind, 2011) turned their center of attention on sustainable tourism. Furthermore, the 'sustainable' concept hasbeen filtered many times to develop its practical application in the economic development of a nation. Therefore, it has emerged a useful form of tourism both for tourists and destination communities.Sustainable tourism may be thought of as "tourism which is in a form that can maintain its viability in an area for an indefinite period of time" (Butler, 1993).Theidea sustainable tourism has been broadly discussed and explored by scholars such as (Din, 1996; Hardy et al., 2002; Butler, 1993; Coata & Allen, 1999). But,these studies are likelymore emphasis on the physical environment; definitions of sustainable tourism also consist of the social and cultural environment of destinations. Further, many scholars have tried to build up a definition for sustainable tourism (Hardy et al., 2002; Manning, Clifford, Docherty, & Ernst, 1996; Coata & Allen, 1999; House, 1997; Hunter, 1997). However, Butler (1993) thoughtthat sustainable development in the context of tourism could be taken as tourism which remains viable over an indefinite period and does not degrade or alter the environment (human and physical) in which it exists to such a degree that it prohibits the successful development and well-being of other activities and processes. Thus, it is broadly recognised that the development of sustainable tourism is necessary to the future of both the tourism industry and the protected areas (Dewhurst & Thomas, 2003; Lascurain, 1996; Eagles *et al*., 2002; Europarc Federation, 2001; International Union for Conservation of Nature, 1994).According to WTO"leading to managementof all resources in such a way that economic,social and aesthetic needs can be fulfilledwhile maintaining cultural integrity, essentialecological processes, biological diversity andlife support systems".

Vernon *et al.*, (2005) opined that modern tourism is characterized by numerous collaborative initiatives amongdiverse stakeholders. The importance of collaboration and partnerships for achieving sustainable development was articulated in the 1987 Brundtland Report and consequently became enshrined in Local Agenda 21. Bramwell & Lane, (1999) report the factors that were dependable forgrowing stakeholder participation in tourism development. Many studies pointed out that the new era and the approaching decades are a crucial time for the relationship among the stakeholders and sustainable development. more these studies not only emphasized the role of stakeholders for the preservation of the world's intrinsic assets for future generations, but also for all other industries that use the earth's natural resources and may be the part of tourism industry. but, the tourism's contribution to the global economy and its potential for enabling sustainable development are becoming more evident.

According to Butler (1993) sustainable tourism development involves management of all resources in such a way that "economic, social and aesthetic needs are fulfilled while maintaining cultural integrity, essential ecological processes, and biological diversity and life support systems". Thus, the growing interest in development and the demand for sustainable growth resulted in greater concern for, and awareness of, the role stakeholders play in determining the sustainable tourism development (Mohinder and Arvind, 2011;Milne, 1998; Mowforth & Munt, 1998). As a result many tourism researchers consider stakeholders based approaches to tourism development as a tool for successful and sustainable tourism development (Mohinder and Arvind,2011;Din, 1996; Tosun & Jenkins, 1998; Woodley, 1993). Thus, if collaboration between diverse stakeholders is to deliver a more sustainable tourism agenda, there needs to be greater understanding of the Sustainable development. It is a pattern of resource use that aims to meet human needs while preserving the environment so that these needs can be met not only in the present, but also for future generations (Pearce et al, 1991).

Today, tourism is appreciated as an economic giant not only for developing nations but also for the developed countries globally. Tourism Industry in North India has been given very high priority and the Government has developed an appropriate infrastructure for its development which includes provision of public utility services, roads, communication network, airports, transport facilities, water supply and civil amenities, etc. Therefore, recently the north India has aiming at promoting sustainable tourism, encouraging private sector to develop tourism related infrastructure in the country without disturbing the existing ecology and environment. Infect, addressing the challenges of tourism development in the north India, it require a strong co-operation among all parties, including those operating within and outside area boundaries, as well as those that can promote effective management of protected areas by ensuring that the appropriate planning and management tools are adopted.

Although, the goals of diverse stakeholders can be quite varied, tourism activities can only be sustainable if implemented with a common understanding and consensus-based approach to development. Stakeholders play a central role in the tourism industry. As intermediaries between tourists and tourism service suppliers' stakeholders can influence the choices of consumers, the practices of suppliers and the development patterns of destinations. This unique role means that stakeholder can make an important contribution to furthering the goals of sustainable tourism development and protecting the environmental and cultural resources on which the tourism industry depends for its survival and growth. Till date, little has been done to develop sustainable tourism in North India. although, this area has wonderful tourist appeal to attract both the tourists international and domestic. In fact more research is desirable to fill this gap and to further examine the existence of the relationship between sustainable tourism development and stakeholders, it is important to conduct research in the context of stakeholder's perceptions of sustainable tourism development. Thus,theplan of the present study is to examine the perception of residents, tourists, hotelier and travel agents tourism in respect to sustainable development of tourism and to study the role of tourism stakeholders in promotion of sustainable tourism in North India and to suggest the measures for promotion of sustainable tourism in the study area.

REVIEW OF LITERATURE AND HYPOTHESIS DEVELOPMENT

Throughout the literature a various views have been emerged about the tourism stakeholders in promotion of sustainable tourism development. Tatoglu et. al,(2000)identified the perceived impacts of tourism by residents in a community, Kuşadas, located on the Western Turkish coast. The most strong and favourable perceptions toward tourism impacts are found to be associated with economic and social and cultural aspects of tourism. The study also identified whether there exist any significant differences between demographic variables and residents' attitudes toward tourism by the analysis of variance. Similarly, Fariborz and Ma'rof (2009) explored the relationship between the community leaders' perceptions toward tourism impacts and their effort in building the capacity for tourism development in local communities of Shiraz, Iran. The study suggested most significant relationship with the level of community capacity building towards that those leaders who perceived the tourism activities could bring economic benefits would have the higher tendency to be actively involved in building the capacity of their communities in relation to the development of tourism, whereas those who perceived tourism could bring negative impact to the environment, would put less effort in the capacity buildingSingh (2008) presented herein testifies to the fact that planning and development agencies rationalize the violation of thresholds on the basis of tourism growth. The article commences with the argument that the discernment of the purpose and limits of destination development are crucial for its sustainability. Consequently, it is recommended that interest groups focus their attention on the long-term viability of the core product, primarily, to avoid unacceptable product innovation. Further, Mohammed (2007) measured the effect of tourism development on the standard of living of the Egyptian people. The study shows that local people have positive attitudes towards tourism development indicators and there are some negative socio-cultural impacts of tourism development on local communities in Egypt. Bansal and Jaswinder (2011) examined the ecotourism perspective from the point of view of major stakeholders of ecotourism, i.e., local communities, Tourists, ecotourism operators, and government officials in Great Himalayan National Park (GHNP) of Kullu district in Himachal Pradesh. This study determines the various issues related to ecotourism and these stakeholders' opinions about these issues. This study gives some suggestions to increase ecotourism awareness, capacity building for ecotourism for the local community, and community participation for the development of ecotourism in GHNP. Mohinder and Arvind (2011) investigated various sustainable tourism development dimensions among tourism stakeholders and whether these dimensions depend on the demographic characteristics of stakeholders. The study reveals that there is a set of sustainable tourism development parameters that is most common. This study indicates that there is a significant difference among the tourism stakeholders in terms of perceived sustainable tourism development dimensions in India. Moli (2011)analysied the newly emerging community-based eco-cultural heritage tourism (CBECHT) can be effectively used in the region for achieving the objectives of sustainable development by integrating pro-poor tourism approaches Such approaches are strongly promoted and supported by several international organizations as well as Local Agenda 21. This study provides a broad conceptual framework for this approach and evaluates the potentials and constraints for evolving and implementing such strategies in the region with their policy/planning implications. Liu (2003) pointed out that sustainable tourism should meet the needs of the local population's standard of living over the short and long terms. He suggested that along with tourism stakeholders local population has increasingly been recognised as part of the tourism resource, however, is problematic as it is often the disadvantaged social groups that experience the most negative consequences and the fewest beneficial consequences of tourism development.Sharma (2006) identified a range of strategic determinants essential for the successful development of mountain tourism in India He concluded that community leadership and a favorable national or regional policy environment are two central components of successful community based mountain tourism initiatives He recommended some crucial aspects for the development of sustainable mountain tourism in the country such as ecosystem fragility, political and economic marginality and cultural diversity.Ritchie and Inkari (2006) highlighted that although residents are generally supportive of tourism development and cultural tourism development, there are differences in opinion concerning the perceived and actual witnessed impacts. Weaver and Lawton (2001) examined Tambourine Mountain, a destination in the urban rural fringe of Australia's Gold Coast regarding the residents' perceptions of tourism this study revealed that supporters constitute only one-quarter of the population, who acknowledge economic, benefits, but are ambivalent about social impacts. Bramwell (2009) reviewed approaches to identifying the stakeholders who are affected by a tourism project and who might participate in collaborative tourism planning. The study examine whether the range of stakeholders participating in the planning process was representative of the stakeholders affected by the project and was also likely to encourage consideration of the diverse issues of sustainable development. It is found that varied stakeholders had participated in the planning process, but there was only limited participation by the private sector and environmental NGOs. Tazim and Amanda (2009) pointed out this challenge by focusing on three aspects important for sustainability: (1) complexity (nested systems of biophysical environments, tourism and park management structures, community– resident systems, local–global systems and use–conservation gap; (2) scale, structure and scope of collaborations (including community involvement and control) and (3) challenges of implementation and long term structuring (for sustainability and success).The study shows an evolving partnership between local and international stakeholders toward local control, and also a complex relationship between local–traditional and scientific knowledge, and cultural change. Øystein Jensen (2010) discussed the role of the local, or regional, guide as a social mediator between a host society and tourists, as a means of sustainable tourism development in developing world locations. This study is suggested that the increased use of local guides with good social relationships with the local communities as against the mere employment of non-local accompanying guides working for centrally located tour operators can enrich the mutual experience quality in the encounter between visitors and hosts and support local sustainable development by enhanced local involvement. Implications for sustainable tourism practice are discussed. Bjørn P Kaltenborn et.all. (2008) examined associations between the environmental attitudes of residents and attitudes towards second-home development in two regions in Southern Norway, with community attachment and economic dependency as additional predictors. Eco-tourism was found to have a strong negative effect on attitudes towards tourism development, while, in contrast to previous findings, community attachment did not have significant effects. Economic dependency is significantly related to attitudes towards development; both eco-tourism and economic dependency are mediated by other variables, such as expected impacts and benefits. The findings are important in planning to reduce potential conflicts.

Amuquandoh (2010) recommended that the district assemblies in partnership with the Ministry of Tourism should start managing the impacts, and also educate the local population on the dangers of underestimating the negative impacts of tourism on the environment. McVey(1993)suggested the three core elements of sustainability, which are economic sustainability, which refers to maintaining growth rates at manageable levels; promoting tourism while keeping an eye on capacities to handle greater demand in order to avoid consumer dissatisfaction; social sustainability, which refers to society's ability to absorb increasing tourist arrivals without adversely affecting or damaging indigenous culture; and environmental sustainability, which is related to the capacity of the natural and built environment to handle tourism without damage. Thus, sustainability of a system is fundamentally concerned with not only environmental, but also socio-cultural and economic factors and, crucially, how these are interlinked to develop sustainable tourism in the region (Blackstock et al., 2006).

Mohinder (2007) examined the awareness of hoteliers towards the impact of the hotel sector on the environment vis-à-vis sustainable tourism development. Only 5-10 per cent respondents believed that hotel industry was managed on a sustainable basis while 56 per cent stated that hotels exercised some impact on the environment. A significant finding was that respondents (72.5%) stated that tourists are paying a higher rate for an environmentally friendly hotel. It reflects that hotels pay more attention for environmentally friendly products and services including accommodation. Thus, the findings revealed that hotel sector has scope to prepare, develop and market sustainable products and services that promote environmental awareness among the visitors vis-à-vis increase the yield.

Gardner et al., (2002) evaluated that Community participation too has dissipated with increasing alienation by various interest groups. To make matters worse, an apathetic attitude, on the part of the locals, towards this widespread debasement has emerged with the 'development' agenda being dictated from afar, by people who were either unrelated to tourism. Gupta & Teotia, (2004) stressed the problem of urban growth. It is limited availability of land. Practically every available space of land is built upon legally and illegally. Encroachments are rampant and are to be found even into the roads. Existing roads systems are unable to accommodate the heavy influx of vehicular traffic, due to encroachments. Further, Manali receives approximately 3 lakh (300,000) vehicles per annum during tourist season. This creates a problem of parking in a place that is already stressed for space owing to a limited capacity of 550 vehicles only. Parking issues, in unison with encroachments by hoteliers has created a messy for tourists, managers and residents alike.

Bohdanowicz (2006) stated that the levelof environmental awareness among hotel managers is not high enough to introduce significant changes, although attitudes differ depending on the country of origin and the corporate policy. The prospects of significant cost savings, as well as customer demand were identified as the most likely parameters to enhance environmental responsibility among hoteliers.WTO (2004) stated that a lack of awareness among stakeholders can hamper sustainable tourism development outcomes and that is why it is so important to know the vision of the stakeholders for tourism development. Similarly, Ap and Pang (2002) pointed out that stakeholders' perceptions of sustainable tourism are important, because they can "lead to misrepresentation and abuse of the concept and further depletion of the environment especially with mass tourism". They further stated that the lack of stakeholders' awareness about the possible consequences of tourism can affect negatively sustainable tourism development. Bestard and Nadal (2007) have examined the relationship between the density of hotel beds in a given municipality and local resident perceptions of the negative environmental impacts of tourism using the Balearic Island as a case study. The results have pointed out that concern for environmental impacts of tourism is common among residents. In an another study conducted by Liu, Sheldon, and Var (1987) shows that the growing pressure from tourism, in turn generates stronger criticism of tourism, with a growing public awareness among the population of environmental and cultural problems that it creates and consequent increase in opposition to tourism development. Pearce (1980) argues that areas with a high level of tourism development generate resident dissatisfaction due to traffic and parking problems, crime, inflation, etc. Nevertheless, it is also true that a stronger presence by the tourist industry implies greater economic development and higher incomes for residents.

Hypothesis 1: There is positive association of Residents' perceptions towards sustainable tourism development in North India.

Hypothesis 2: There is a positive relationship between sustainable tourism development dimensions and residents' specific demographic characteristics.

RESEARCH METHODOLOGY

Study Area

The study was conducted in the North India, which consisted the states of Uttar Pradesh, Uttarakhand, Punjab, Haryana, Himachal Pradesh, Jammu & Kashmir and the Union Territories of Delhi and Chandigarh etc areas.

Research Instrument

A structured questionnaire was developed consisting of various questions such as demographic profile of respondents, and Sustainable tourism development variables based on past studies. Further, previous researches were reviewed to identify possible survey instrument and specific sustainable tourism development factors that should be tested. Thus, this study was based on the scale and methodology developed by various authors in the review of literature (Bansal,and Jasbinder;2011;Mohinderand Arvind, 2011;Pearce, 1980;Liu, et. al., 1987;McVey, 1993; Kaltenborn et.all. 2008; Ap and Pang 2002; Var 1987;Pearce 1980 Hardy et al., 2002; Coata & Allen, 1999; House, 1997; Hunter, 1997). Initially, 61 items were emerged but after survey only 43 items were found significant. Likert-type scale values assigned 1 to “strongly agree”, 2 to “agree”, 3 to “neither agree nor disagree,” 4 to “disagree” and 5 to “strongly disagree”was provided to the subjects for them to use in indicating the importance of each of the 71 general sustainable tourism development statements. Of 2300 only 1380 (60%) respondents com-

Figure 1.

pleted the questionnaires and were valid. The data are analysed with the statistical package programme for social sciences (SPSS 12 for Windows). The basic analysis and tests utilized in this studyincludes descriptive-statistics analysis, factor analysis, mean and bivariate statistical procedures etc.

Sampling and Data Collection

See Table 1.

RESULTS AND DISCUSSION

Factor 1, environmental impacts (EI) consist of Damage natural environment and landscape, Destroy local ecosystem, Increases environmental pollution (litter, water, air), Overcrowding, Construction of hotels has destroyed the natural environment in tourist attraction Areas, Disruption of wildlife breeding cycles & behaviors', Loss of open space, Preserves environment and improves the appearance and images of an area, Wildlife and natural habitats protected, Water shortages, Provides more parks and other recreational areas, Nature-based development, Regulatory environmental standards Neededetc. items. The item Increases environmental pollution (litter, water, air) with highest loading(.752).

Factor 2, socio-cultural impacts (SI) includes rise in criminal & antisocial activities,Deflation of local culture,Increases traffic accidents, increases traffic accidents,Local residents have suffered from living in tourism destination areas, Increases demand for historical & cultural exhibit, Improves quality of police and fire protection, Increases gambling & illegal games, Increases availability of recreational facilities and entertainment. The itemIncrease traffic accidents with highest loading(.758).

Factor 3, Economic impacts (Eco.I)includesIncreases tax revenues, Improves public utilities infrastructure, Improves transport infrastructure,Increases opportunities for shopping, Economic impact is widespread in the community, Creates new business opportunities, Competition for land with other (higher value)economic uses, Profits may be exported by non-local Owners, Increases employment opportunities, Increases tax revenues, Improves investment and development. The item IncreasesProfits may be exported by non-local Owners(.640).

Table 1. Distribution of sample according to stakeholders' specific characteristics

Category	Sample size	Respondent	Percentage
Travel Agency \Tour operators	350	250	18.11
Hotels\ resorts\restaurants	300	251	18.18
Residents	850	459	33.26
Tourists	800	420	30.43
Total	2300	1380	100

Table 2. Factor analysis results for the perceptions of community towards sustainable tourism development items

	Factor 1	*Factor 2*	*Factor 3*
Explained variation (per cent)	27.04	24.61	21.35
Eigen values	6.49	7.10	4.76
1. Environment impacts			
Damage natural environment and landscape	.687		
Destroy local ecosystem	.745		
Increases environmental pollution (litter, water, air)	.752		
Overcrowding	.750		
Construction of hotels has destroyed the natural environment in tourist attraction Areas	.621		
Disruption of wildlife breeding cycles & behaviors'	.541		
Loss of open space	.517		
Preserves environment and improves the appearance and images of an area	.501		
Wildlife and natural habitats protected	.550		
Water shortages	.560		
Nature-based development	.515		
Provides more parks and other recreational areas	.514		
Regulatory environmental standards Needed	.577		
2. Socio-cultural impacts			
Rise in criminal & antisocial activities		.747	
Deflation of local culture		.740	
Increases traffic accidents		.758	
Increases robberies		.728	
Local residents have suffered from living in tourism destination areas.		.525	
Increases demand for historical & cultural exhibit		.552	
Improves quality of police and fire protection		.564	
Increases gambling & illegal games		.507	
Increases availability of recreational facilities and entertainment		.534	
3. Economic Impacts			
Increases tax revenues			.536
Improves public utilities infrastructure			.579
Improves transport infrastructure			.568
Increases opportunities for shopping			.574
Economic impact is widespread in the			.586
Creates new business opportunities			.500
Competition for land with other (higher value)economic uses			.608
Profits may be exported by non-local Owners			.640
Increases employment opportunities			.517
Increases tax revenues			.524
Improves investment and development			.505
Cronbach alpha	0.90	0.92	0.80

According to the stakeholder's valuation survey, there are great variances between the studied stakeholders; travel agency/tour operators have the highest total mean attitude value (7.2). On the other hand, tourists have the lowest total mean attitude value (5.61). As far as thesocio-cultural impacts are concerned, travel agency/tour operators have achieved the highest score (6.1), while tourists present the lowest score in this dimension (4.31). It is worth pointing out the variances inHotels/Restaurants, while its score inEconomic impacts (Eco.I) is quite high (6.7), it appears to fall short in other factors. From the comparison between the mean values of socio-cultural impacts and their individual average importance values revealed in Table 3.

CONCLUSION

The study contributed to the current knowledge of sustainable tourism development in India. It has provided additional insights into areas relating to different dimensions of sustainable tourism development as perceived significant by the tourism stakeholders. This research found significant differences among the stakeholders in sustainable tourism development in Manali region. The results indicates that most of stakeholders does not have clear understating about sustainable tourism only a few respondents such as travel agency and tour operator companies have some broader understanding of sustainable tourism development. Interestingly, some respondents know the importance of economic and environmental aspects for sustainable tourism development practices. However, the findings shows that the socio – cultural have usual little awareness by the stakeholders. Thus, the study revealed that there is a set of sustainable tourism development parameters that is most common constituted from environmental impacts (EI), socio-cultural impacts (SI), economic impacts (Eco.I) . These findings are consistent with previous studies, that refer to 'social and environmental' as the most important for sustainable tourism development (Bansal,and Jasvinder, 2011; Mohinder and Arvind, 2011; Pearce, 1980; Liu, et. al., 1987; McVey, 1993;). Finally, results recommended that stakeholder participation is anessential part of sustainable tourism development. The results clearlysuggested that policy makers, local communities, and private agencies engaged in sustainable tourism marketing and development, tour operators and

Table 3. Mean values of sustainable tourism development dimensions in sample respondents

Attributes (sustainable tourism development dimensions)			
Stakeholders	**EI SI Eoc.I**		
Travel agency /Tour 0perators	7.2	6.1	6.3
Hotels/Restaurants	6.1	5.7	6.7
Tourists	5.61	5.5	6.5
Residents	5.62	5.6	6.2
Mean value of sustainable tourism development dimensions	6.13	5.70	6.49
Importance of sustainable tourism development dimensions	0.44	0.50	0.41

other destination marketiers should take into considerationenvironmental impacts (EI), socio-cultural impacts (SI) andeconomic impacts while developing tour package or service.The findings of this study are limited by the nature of the sample. In essence, these findings cannot be generalized to the population at large in India, since tourism stakeholders differ with respect to perceptions toward sustainable tourism development. Given the fact, more studies especially comparative would be conducted to cover wider industrial perspectives. In this study we concentrated only on one tourism destination. However, we think that further research is desired to consider the intervening steps, analyzing variables that mediate or moderate the variables.

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KEY TERMS AND DEFINITIONS

Perceptions: A thought held by many persons and based on appearances.

Stakeholder: A person with an interest or concern in something, especially a business.

Sustainable: The use of natural resources when this use is kept at a steady level that is not likely to damage the environment.

Tourism: Tourism is travel for recreational, leisure, or business purposes.

Glossary

Atmospherics: The presentation of a retail store and its products in such a manner that attracts the attention of prospective customers and encourages them to make purchases.

Bulletin Board: A bulletin board is a surface intended for positing of public messages, for example, to advertise items wanted or for sale, announce events, or provide information.

Career I-Deals: Refer to customized arrangements that individual employees negotiate in order to secure promotional opportunities and professional careers.

Competitiveness: The set of institutions, policies and factors that determine the level of productivity of a country.

Consolidator: A consolidator is an organization who puts all the ground components of a package together. For example, bus, activities, accommodation, programming.

Contemporary Tourist: The current tourist who is interested in the emotional dimension of the travel, on the opportunity to do real travelling experiences based on the connection with local community, and by the refusal of the standardisation and commodification of tourism experiences. He seeks for a sustainable and tailored travel.

Content Analysis: Content analysis is a research technique which is used for making replicable and valid inferences based upon interpreting and coding textual material.

Core Self-Evaluations: Include the fundamental qualities people hold about themselves.

Corporate Social Responsibility (CSR): Entail a business approach that contributes to sustainable development by delivering economic, social and environmental benefits for all stakeholders.

E-Commerce: Any business activity that can be conducted over the web.

Efficiency-Driven Economies: Consider the context of higher education and training, goods market efficiency, labor market efficiency, financial market development, technological readiness, and market size.

Emerging Economic Jurisdictions: Also known as simply emerging markets. These are largely developing countries whose economies are at the intermediate stage of development. They are investing more in productive capacity, they are therefore rapidly industrializing through adoption of free market or mixed economy as a way of creating a better quality of life.

Employee Commitment: It describes the extent of an employee's identification with and attachment to an organization.

Employee Motivation: It is defined as a set of energetic forces that originates both within as well as beyond an individual's being, to initiate work-related behavior, and to determine its form, direction, intensity, and duration.

Employee Work Engagement: It is defined as a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption.

Environmental Sustainability: Refers to regulations aiming to environmentally sustainable development.

Environmental-Driven Economies: Consider the context of business environment, safety and security, health and hygiene, human resource management and labor market, and ICT readiness.

Ethiopia: Is a country on the Horn of Africa, the largest and most populous country in that region.

E-Tourism: The way tourism organizations conduct their business and, in particular, the way organizations distribute their tourism products in the online marketplace.

E-Wallet: An eWallet or a digital wallet refers to an electronic device or online service that allows an individual to make electronic transactions.

Factor-Driven Economies: Consider the context of institutions, infrastructure, macroeconomic environment, and health and primary education.

Flexibility I-Deals: Refer to personalized arrangements that individual employees negotiate in order to achieve work hours and scheduling that better fit their needs and preferences.

Global Distribution Systems (GDS): This is an acronym of global distribution system that entails a large computer network, cum a reservation toll that passes hotel inventory and rates to travel agents and allows them to make bookings in real time. The three traditional GDS are Amadeus, Galileo, and Worldspan.

Global North: Refers to countries with the highest level of development, highest level of industrialization and mature democracies. These nations are highly industrialized, have political and economic stability and have high levels of human health.

Global South: A term referring to less developed countries characterized by low level of economic development, large inequalities in living standards and low life expectancy. Loosely entails poor southern countries that are frantically seeking to transform their economies.

Holidays: This refers to breaks and getaways that people take for leisure.

Hoteliers: A proprietor or manager of a hotel.

Idiosyncratic Deals (I-Deals): I-deals refer to voluntary, personalized agreements of a nonstandard nature negotiated between individual employees and their employers regarding terms that benefit each party.

India: Situated in Asian continent, India is seventh largest country by area and is known rich and diverse natural as well manmade touristic resources.

Information and Communication Technologies (ICTs): This refers to a combination of information technology that emphasizes the role of unified communications and integration of telecommunications, computer terminals, software, storage and audio-visual systems that enable users to access, store, transmit and manipulate information.

Information Search: Medical travelers gather internal and external information from various sources, before they make a decision to travel abroad for surgery: for example- friends and family, brochures, television, health insurance, social media, YouTube, and internet websites of government, medical-tour facilitators, hospitals and accreditation bodies.

Infrastructure-Driven Economies: Consider the context of air transport infrastructure, ground and port infrastructure, and tourist service infrastructure.

Innovation: Innovation is all about introducing new concepts, products, services, process, marketing technique, organizational structure to meet the needs of existing and new customers with the overall purpose to stimulate and increase spending and growth.

Innovation-Driven Economies: Consider the context of business sophistication, and innovation.

Intermediary: Is a person or an organization in the travel distribution chain operating between providers of travel services and the public.

International Openness: Refers to air service and regional trade bilateral agreements.

KidZania: KidZania is an experience design concept targeted at young people. The KidZania model could be said to be a form of manipulation of emotions, by pushing the children to behave and consume the way we would like them to.

Knowledge-Sharing: Knowledge-sharing defined by the authors as a process where an exchange for tacit and explicit work-related knowledge takes place including two sides are collecting and donating knowledge based on mutual trust to learn and build new capabilities for improving the organization's performance.

Marketing Strategy: A marketing strategy is a business's overall game plan for reaching people and turning them into customers of the product or service that the business provides.

Medical Travel Agency: Any company, public or private, retailer or wholesaler, which sells MTm packaged tours that, may include doctors' appointments, health and travel insurance, ambulance service, personal attendant, local transportation, accommodation, food, local tours, and overall concierge services. MTFs facilitate and acts like an intermediaries to connect the potential patient with the hospital and specialist surgeon and makes all medical travel arrangements. They help to choose JCI internationally accredited hospital and surgeon in a country to meet patient's healthcare needs and make accommodation, sightseeing and all travel and visa arrangements act as an advocate for the medical tourist.

Medical Travel/Tourism: MTm is a branch of health-tourism. It is a phenomenon where a patient travels domestic/overseas, with/without a companion, for medical treatment. This could be invasive, and involve complex surgical procedures with the use of highly specialized medical technology and skilled surgeons, for the improvement of health and quality of life. MTs may combine it with a vacation if health permits at an exotic destination, pre or post-surgery for recuperation.

Medical Travel/Tourism Facilitator: Businesses that are involved in providing packaged MTm related products and services similar to Travel Agents. However, Medical Tourism Facilitators (MTFs) are difference as they provide information related to various complex surgeries abroad. MTF is a person or a company that helps to coordinate international patient's medical travel arrangements to the host-country for medical treatment, connects patients with the hospital in the host-country, and negotiates on behalf of the MTs, their medical, accommodation and travel plans.

Medical Traveler/Tourist: MTs is a patient who buys a medical product or healthcare service. MTs travels within a country or overseas, for the purposes of receiving medical treatment/surgery and engages in some tourism if health permits. In this research, a patient considers itself as MTs by self-description or by the description of the MTm hospital, complex types of super-surgeries, medical destinations, as well as the medical-tour facilitators. That is, whether the patient considers themselves as a MTs or if the MTm private hospital and surgery-type and medical-tour facilitators, health insurance, hotel and related tourism services considers the patient as a MTs.

Ministry of Tourism, Government of India (MOT): MOT is the nodal agency for the development of tourism in India and formulates national policies and programs. The main objective of MOT is to increase and facilitate tourism in India and to establish her as a preferred destination in the world.

Mintiples: Travel agencies that focus on a particular region.

Multilevel Models: Known also as nested data models or hieratical models, are models of parameters that vary at more than one level.

Online Travel Agency (OTA): An online travel agency can be utilized by a traveler in order to book everything they need for their trip in one place. This can include making hotel reservations, flight reservations and in-destination reservations like tours, attractions, activities.

Online Travel Agents: They are basically traditional travel agents, expect customers self-serve, as they operate online. They are websites where consumers can conduct multiple searches, plan, and place an order for a booking.

Online Visual Merchandising: It is an act of using the visual elements to enhance the overall experience.

Organizational Barriers: Barriers related to an organization.

Organizational Citizenship Behavior (OCB): It refers to work-related behavior that goes above and beyond that is dictated by organizational policy and one's job description.

Perceptions: A thought held by many persons and based on appearances.

Price Competitiveness: Refers to competitiveness arising from policies focusing on prices and taxes.

Prioritization: Refers to government expenditure and to marketing and branding to attract tourists.

Private Tourism Sector: Provide intensive training to local communities/private sector in various aspects of development and management of tourism businesses, and hospitality skills to provide them with better opportunities to seek employment in the tourism sector.

Public Tourism Sector: Are organizations at the Federal and the Provincial levels shall continue to play leading and catalyst role in development of tourism infrastructure (e.g., hotels, restaurants, road-side facilities, resorts, amusement parks, theme parks, etc.).

Resource-Based View: Sees an organization as gaining a competitive advantage from the resources it possesses.

Resources-Driven Economies: Consider the context of natural resources, and cultural resources and business travel.

Sales Techniques: Sales techniques are the methods that sales professionals use to create revenue.

Search Bar: A search bar or search box is a graphical control element used in computer programs, such as file managers or web browsers, and on web sites.

Self-Enhancement Theory: It refers to the motivation that makes people to feel good about themselves.

Service Quality: Refers to excellence provided to the end customer in the service offering provided.

Sharing Economy: A new economic model that uses online platforms to match offer and demand, working in a peer-to-peer logic to connect who need with who has. In this way idling assets, dead capital and latent expertise can be recirculated opening new economic opportunities, reducing waste and consumption and favouring new forms of socialization. At tourist level it opens new opportunities and solutions often more valuable and more affordable than those provided by the traditional tourist market.

Social Exchange Theory: It refers to the process of negotiated exchanges between parties.

Stakeholder: A person with an interest or concern in something, especially a business.

Sustainability: A more respectful approach to local culture and the environment that is not prejudicial to the social and economic interests of the population in tourist areas, to the environment or, above all, to natural resources.

Sustainable: The use of natural resources when this use is kept at a steady level that is not likely to damage the environment.

Sustainable Tourism: A form of tourism that preserves the local cultural heritage and consider as key elements the respect for the environment and the local cultures, the equal distribution of the economic benefits that derive from tourism, the cooperation on a local, national and international level.

SWOT Analysis: A SWOT analysis is a simple but powerful tool for understanding an organization's resource capabilities and deficiencies, its market opportunities, and the external threats to its future. SWOT analysis has been used by academics and organizations not only for identification of the key issues concerning a strategy formulation, but also for its execution.

Task I-Deals: Refer to personalized arrangements that individual employees negotiate in order to make their job content more motivating, rewarding, and enjoyable.

Tour Operation Industry: This is an economic sector concerned with provision of vacation products to the general public. The industry focuses on tourist source regions, transit regions, and destination regions. The sector is dominated by tour operators, travel agencies, national tourism organizations, and other transnational tourism-related organizations.

Tour Operator: A tour operator typically combines a tour and travel components to create a holiday. While considering tourism business information and technology, the tour operators examines bookings such as transportation, sightseeing, accommodation, etc., planned in advance.

Tour Operator: Is a company that provides holidays in which travel and accommodation are booked for.

Tourism: This refers to travel be it for leisure, business or holidays. Tourism is a very lucrative sector that contributes to county's GDP.

Tourism: Tourism is travel for recreational, leisure, or business purposes.

Tourism Companies: Tourism companies include tour operators and travel agencies.

Traditional Travel Agent: A travel agent who works out of a brick-and-mortar location, available in-person to help out people who want to plan a vacation.

Travel: The action and the experience of travelling.

Travel Agency (TA): A retailer in the distribution channel of tourism products who provides tourism and travel related information to customers, selling tourism products to customers on behalf of TOs in return for a commission.

Travel Agency Sector: This sector is made up of private retailers or public service that provides travel and tourism related information and packages to clients who want to travel.

Travel Agents (TAs) and Tour Operators (TOs): Travel agents (TAs) and tour operators (TOs) are retailers and as such they sell a variety of products and services, among these are: tours; overseas package tours; short break holidays; flights; theatre booking; car hire; cruising holidays; rail tickets; coach holidays and tickets; travel insurance; foreign exchange. This is in addition to bureaucratic services: visa and passport applications; making reservation; planning itineraries; calculating fares and charges; advising clients; and dealing with customer complaints.

Traveler: A distance from the concept of tourist; interpreted as a better way of interacting cross-culturally, without creating the problems associated to the so-called mass tourism.

Word of Mouth (WOM): This is free advertising which is triggered by customers` experiences. When a vacationer has a wonderful tour experience because their expectations were exceeded and later on tell tweets about it.

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About the Contributors

Mohinder Chand Dhiman is currently Professor and Chairman in the Department of Tourism & Hotel Management at Kurukshetra University – Kurukshetra. Prof. Mohinder's teaching interests have been in Travel Agency Management, HRM in Hospitality and Tourism, Finance & Accounting, and Hospitality Strategic Management. He has developed / designed various courses in tourism & hospitality at university level. He has been in the expert committees of universities and other government institutions. With an experience of more than 25 years in academics, management and administration, Professor Mohinder has supervised more than 20 PhD and M.Phill students. He has more than 95 research papers to his credit and authored nine books. He has completed research project and associated with many research works for government and other agencies. Professor Mohinder has served at various responsible positions like, Warden, Coordinator- Corporate Resource Centre and many more positions at Kurukshetra University. He is a member of various organizations both social and academic at national and international level. He has been in expert committees of University Grant Commission and other apex bodies of Government. Presently, he is the editor of *International Journal of Hospitality and Tourism Systems (Scopus indexed).* Prof. Mohinder is serving as Editorial Board member of many international and national journals. He is also General Secretary of Indian Hospitality Congress (IHC).

Vinay Chauhan is the Dean (Planning & Development), Himachal Pradesh Technical University. He also holds the position of Professor, The Business School, University of Jammu. He comes with the teaching and research experience of over 16 years at PG level in university system. He has held several academic and administrative positions during his career like Chief Warden- Boys Hostel- JU, Deputy Coordinator (UGC-SAP DRS-II)-TBS JU, Convener, Publication Cell- JU, Editor of the Journal "Researcher" Journal of University of Jammu and UGC Nominee of SAP programme of Dibrugarh University, Assam. As a researcher he has 3 research projects funded by ICSSR & UGC, 03 books, 40 research papers besides being on the editorial board of several journals. He has guided eight research scholars at doctoral level. He is also member of the Board of Studies of several universities like University of Jammu, Central University of Himachal Pradesh, Central University of Jammu, Cluster University of Jammu, etc.

* * *

Ankush Ambardar holds a Master's of Hotel Management form University of Kurukshetra and has earned his Ph.D. in Training and Development Practices in hotels of India from University of Kurukshetra. He is having blend of industry and teaching experience. Presently he is serving in the Department of Tourism and Hotel Management, Kurukshetra University. He has been lastly associated with UIHMT, Panjab University; CT Institute of Hotel Management; IHM, MM University, Mullana and has earned industry experience from Marriott Welcome Hotel, New Delhi; Intercontinental Hotel, New Delhi; Ashok Hotel Bangalore. Dr. Ankush's teaching interests have been in Hotel Accommodation Operations, Human Resource Management. As a part of his research program, Dr. Ankush has published more than 25 research papers in Tourism and Hospitality journals nationally/internationally *and* conference proceedings and books. He has also presented more than 30 research papers in various conferences/seminars. He is in process of guiding scholars in Ph.D and M.Phil Programmes. Dr. Ankush is also serving as Editorial Board member for the various journals like Journal of Kashmir for Tourism and Catering Technology, International Journal of Hospitality Business and Research, etc. DrAnkush is also reviewer of many international and national Journals such as Advances in Hospitality and Tourism Research, Turkey, International Journal of Hospitality Business and Research, etc.

Nashwa Fouad Attallah is a professor and Vice Dean for Postgraduate Studies and Research at the Faculty of Tourism and Hotels, Alexandria University, Egypt. She has published and reviewed several papers and theses in the tourism field. Her main research areas are ecotourism, tourism marketing & management, service quality and sustainable development.

Monica Bernardi has a Ph.D. in Quality of Life in the Information Society. She currently holds a Post Doc position at the Milano-Bicocca University, Department of Sociology and Social Research. Her main research focus deal with the smart city, sharing city, social innovation, sharing economy and the governance model that favor the creation of a sharing ecosystem in the urban tissue, with a special interest on the role of the public administration. She teaches in laboratories and classes at the degree course of "Science of Tourism and Local Community" of the Milano-Bicocca University. She was visiting scholar at the Tuft University in Boston and at the Gyeonggi Research Institute in Seoul.

S. S. Boora is engaged in the teaching and research in the field of tourism management, cultural and sustainable tourism in the Department of Tourism & Hotel Management at Kurukshetra University, Kurukshetra (India). Indian culture and his primary area of writings is to explore the linkages between tourism and culture. He has evaluated India's performance in international tourism in his works. He is the editor of *Indian Journal of International Tourism & Hospitality Research* - an in house publication. He was the Coordinator of UGC-SAP programme in tourism in his parent Department.

Nunzia Borrelli is Assistant Professor at the University of Milano-Bicocca. She obtained the Ph.D. in Spatial Planning and Local Development, at Turin Polytechnic in 2005. Since completing Ph.D., she has both taught and been involved in various research activities. She conducted field research projects pertaining to local development, ecomuseums, cultural heritage and governance processes in Italy, UK and USA, China. She was visiting scholar at the Loyola University of Chicago as Fulbrighter; Portland State University (USA), the University of Newcastle upon Tyne (UK); Xiamen University (China) and Cardiff University (UK). She has published several papers and four books.

Farah S. Choudhary is working as Assistant Professor, The Business School, University of Jammu since 2011. PhD in Digital Marketing. Area of Interest include Investment analysis and Digital Marketing. Papers Published in peer reviewed journals and attended International/National conferences across country.

Frédéric Dosquet is professor at Pau Business School (France). He is also Visiting Professor in Middle East (Lebanon) and Africa (Cameroon and Ivoiry Coast). He is the writer of 17 books and many chapters and conferences about political marketing and tourism marketing.

Megha Gupta is an Assistant Professor of Hotel Management at the University of Kurukshetra. She holds a Masters of Hotel Management (MHM) form University of Kurukshetra (2004), and has earned her Ph.D. in “Issues and trends in gender equality in Indian hotel industry- A study of National Capital Region” from University of Kurukshetra (2013). She is having blend of industry and teaching experience. Her area of interest includes Accommodation Operations and Marketing Research. She has attended and presented papers in numerous seminars, conferences and workshops. She has also published research papers in journals of repute. She has been teaching undergraduate, graduate, and post-graduate since 2004. She has a strong hold on teaching methodology gained through a variety of courses taught in institutes like:- C T Institute of Hotel Management & Catering Technology, Jalandhar, Punjab; MMIHM, M.M. University, Ambala. Moreover, she has obtained industrial exposure from hotel properties like Select Holiday Resorts, Gurgaon; Radisson, Delhi.

S. K. Gupta, a Professor in Tourism in Centre for Mountain Tourism and Hospitality Studies, HNB Garhwal University (A Central University), Srinagar Garhwal, Uttarakhand, India, is committed in imparting knowledge through research and innovation in the field of Tourism and Hospitality since last 25 years. He had shouldered responsibility of Dean, School of Management and is currently holding the responsibility of Director of Centre for Mountain Tourism and Hospitality Studies, HNB Garhwal University. He is also the Coordinator, of European UnionErasmus+ programme for Inter-institutional collaboration between Dimitrie Cantemir University, Romania and HNBG University. His expertise in areas of tourism planning, Travel Trade, Community based Tourism promotion and innovations in tourism and hospitality industry are widely acclaimed. He has undertaken many national research projects to deal with regional issues of tourism promotion. Prof. Gupta has delivered guest lecturer in many international and national universities. He has published six books both as author and editor, several research papers in national and international journals and edited books. He has participated in a number of national and international conferences in India and abroad and has organized several national and international conferences. He is the Editor of” Journal of Tourism” (JOT), an international journal and Associate Editor of, “Ecoforum Journal” and “Revista de Turism- StudisiCercetari in turism”, International Journals, from Romania. He is also the member of several academic bodies of Different Universities in India. He was the President, Northern Region of Indian Tourism and Hospitality Congress from the year 2013-2016.

Hala Nabil Hilaly is a professor and Vice Dean for environment development and community service at the Faculty of Tourism and Hotels, Alexandria University, Egypt. She has published and reviewed several papers and theses in the tourism field. Her main research areas are tourism Statistics and data mining, tourism Economics and sustainable development.

Anastasia A. Katou is an Associate Professor of Organizational Strategy at the Department of Business Administration, University of Macedonia, Thessaloniki, Greece. Her research interests include human resource management, organizational behavior, and business strategies, with a focus on organizational performance. She received a BA and an MBA from the University of Sunderland, U.K., and a PhD and a PG Diploma from the Cardiff University, Wales, U.K. She has published numerous articles in leading academic journals.

Eleni F. Katsouli is a Professor of Economics at the Department of Applied Informatics, University of Macedonia, Thessaloniki, Greece. Her research interests include International Economics, with a focus on European Economics. She received a BSc in Economics from the Graduate Industrial School of Thessaloniki, Greece, and a PhD from the University of Macedonia, Greece. She has published numerous articles in leading academic journals.

Ravi Bhushan Kumar was born and brought up in the lap of nature of Jharkhand where he did his schooling from famous Netarhat School and topped in Ranchi University in the subject of Geography Honors. Then he did his higher studies from Jawahar Lal Nehru University, New Delhi. Then he joined Department of Tourism and Hotel Management, Kurukshetra University, Kurukshetra, Haryana. Now he is professor in the same department. He was conferred upon with prestigious 'Rahul Sankrityayan Award'as best author in tourism by Ministry of Tourism, Government of India. His articles have been published in several journals, magazines and news papers. He has guided several M.phil and Ph.D students. His other interests include paintings, photography, sculpture, etc.

Kusum is an Assistant Professor of Travel and Tourism Management at GNA University, Phagwara. She is engaged in the teaching and research in the field of travel and tourism. She holds M. Phil. (Tourism Management), MBA (Hospitality Management), Master in Tourism Management (MTM) from Kurukshetra University and has earned her Ph. D. in "Evaluating overseas market and marketing for inbound tourism in India" from Kuruksehtra University (2018). She has blend of industry and teaching experience. Her area of interest includes travel and tourism management and tourism marketing. She has attended and presented papers in various seminars, conferences and workshops.

Himanshu Malik has done his UG and PG in hotel management from National Council of Hotel Management and has earned his PhD from Kurukshetra University. The author has published many research papers in reputed journals and books. The author has also attended many conferences, seminars and workshops. He has worked both in industry and academics. Presently he is working as Associate Professor with Chandigarh University, India.

Anita Medhekar is an economist. She has taught economics at undergraduate and post graduate levels. Currently, she is teaching at Central Queensland University, Rockhampton, Australia. Her research interests are in micro and macroeconomics, international trade, development economics, public finance, South-Asia, health economics, tourism economics, trade and development for peace, and public-private partnerships. She has presented papers at numerous international conferences and has many publications to her credit as refereed conference proceedings, book chapters, and journal articles.

Vannie Naidoo is a senior academic in the School of Management, IT and Governance at University of KwaZulu-Natal. She has a PhD (Management) from University of KwaZulu-Natal, SA. She has taught at both undergrad and post-grad modules in Corporate Strategy, Project management, Entrepreneurship, Contemporary Issues in Marketing and Research Methodology. Dr Naidoo is an international researcher who has attended numerous conference in SA and abroad. In 2017 she was keynote speaker at the conference-Emerging Trends in Academic Research ETAR-2017, November 27-28, 2017 Bali, Indonesia. She has published in various local and international journals and many book chapters in various interdisciplinary fields of study. Her field of research is in areas of strategy, entrepreneurship, marketing, service quality, ICT's in education, workplace dynamics and management.

Vijay Prakash is currently working as a Research Associate at the Faculty Development Centre, HNB Garhwal University, Srinagar Garhwal. Before this, he has been associated with Centre for Mountain Tourism and Hospitality Studies, HNB Garhwal University, Srinagar Garhwal and Department of Tourism Management, IG National Tribal University, Amarakntak as a guest faculty. He has been awarded Post Doctoral Fellowship by ICSSR, new Delhi for 2017-19. Several research papers in reputed national and international journals are also in his credit.

Sabina Riboldazzi is Assistant Professor of Management at the University of Milano-Bicocca, Department of Economics, Management and Statistics, Milan. She graduated from the University of Piemonte Orientale and gained her Ph.D. in Marketing and Business Management from the University of Milano-Bicocca. She teaches market-driven management and global marketing management.

Hugues Seraphin is a senior lecturer in event and tourism management studies at University of Winchester Business School. He has published in some of the leading journals in tourism management.

Alka Sharma presently Director & Professor at The Business School, University of Jammu. Having teaching experience of more than 25 years. Published around 50 papers in peer reviewed journals and attended around 40 International/National conferences across country. Supervised more than 10 PhDs till date.

Minky Sharma has done her UG and PG in Commerce from reputed Universities of India. The author has published many research papers in reputed journals and books. The author has also attended many conferences, seminars and workshops. She has worked both in industry and academics. Presently she is working as Assistant Professor with Chandigarh University, India.

Mahmoud Ahmed Abdelraaouf Abou Shouk, Lecturer (PhD) in tourism department, Faculty of Tourism and Hotel Management, Pharos University, Alexandria, Egypt. Dr. Mahmoud has published research papers in international and national journals.

Yezihalem Sisay Takele is an academic staff at the department of tourism management, under the institute of paleo-environment and heritage conservation, Mekelle University, Tigray, Ethiopia. He is now a PhD fellow in the department of heritage conservation under Mekelle University, Tigray, Ethiopia. Further he studies tourism management in Kleßheim, ITH,and Salzburg, Austria.

Abhishek Vaishnava is a doctoral fellow at Centre for Mountain Tourism and Hospitality Studies, HNB Garhwal University, Srinagar Garhwal, Uttrakhand.

Vivek holds a Bachelor's Degree in commerce from University of Kurukshetra, a Master's of Tourism and travel Management from Bundelkhand University Jhansi (2005), a Master of philosophy in tourism (Gold Medalist) form University of Kurukshetra (2007) and has earned his Ph.D. in Sustainable Tourism Development from University of Kurukshetra. He is having blend of industry and teaching experience. Presently he is serving in the Institute of Integrated & Honors Studies, Kurukshetra University. Dr. Vivek's teaching interests have been in Hotel Business, Sustainable Tourism, and Salesmanship in Tourism Management. As a part of his research program, Dr. Vivek has published more than 10 research papers in Tourism and Hospitality journals nationally/internationally and conference proceedings and books. He has also presented more than 20 research papers in various conferences/seminars.

Zibanai Zhou, Lecturer and Head of Department, Tourism & Hospitality Management, Faculty of Commerce, Midlands State University, Gweru, Zimbabwe. DPhil candidate, holder of an Msc & Bsc in Tourism & Hospitality Management, Elementary Fares and Ticketing. Research interests span Tourism and destination management, event tourism, and community tourism development.

Index

A

Atmospherics 226, 237

B

Bulletin Board 216, 227, 230, 237

C

Career I-Deals 67, 74, 80
Children 48-50, 52-53, 56, 64, 153, 211, 263
Competitiveness 6, 14-16, 25-26, 29, 49, 66, 76, 84, 120, 167, 169, 205, 272, 274, 279-281
Consolidator 13
Consumer Generated Content 239-243, 245-248
Consumer Websites 133, 135, 137-138, 140
Contemporary Tourist 31-32, 37-38, 42, 46
Content Analysis 87, 216-217, 226-227, 237
Core Self-Evaluations 65-68, 70-71, 74, 76, 80
Corporate Social Responsibility (CSR) 165
Customer 5, 48, 50, 58-59, 64, 101, 105-109, 115-118, 123-126, 134-135, 138-140, 146, 153, 159-160, 195, 219-225, 241, 253, 260-262, 273-277, 289

D

Disintermediation 134, 136, 140
DMO 166-169

E

E-Commerce 117, 123, 132, 134, 136, 150, 158, 160-161, 219, 224-226, 239, 273-277, 281
Efficiency-Driven Economies 29
E-Marketing 252, 272-281
Emerging Economic Jurisdictions 144-148, 150-153, 155, 159, 165
Employee Commitment 68, 74, 80
Employee Motivation 68, 76, 80
Employee Outcomes 65-67, 69-70, 73-76
Employee Work Engagement 68, 74-75, 80
Environmental Sustainability 15, 26, 29, 33, 288
Environmental-Driven Economies 29
Ethiopia 103, 201-203, 206-210, 212, 215
E-Tourism 116-117, 123, 132
E-Wallet 227, 237

F

Factor-Driven Economies 29
Flexibility I-Deals 68, 74, 80

G

Global Distribution Systems (GDS) 136, 165, 219
Global North 145, 148, 150, 165
Global South 165

H

Holidays 3, 7, 46, 50, 52, 56, 64, 87, 108, 115, 135, 140, 148-149, 156-157, 206, 215, 227, 261, 271
Hoteliers 3, 200, 209, 215, 284, 288-289

I

Idiosyncratic Deals (I-Deals) 65-66, 76, 80
Impact 3-4, 14, 32-33, 35, 50, 52, 57, 75-76, 102-104, 108-109, 117, 134, 137, 141, 153-154, 157, 174, 192-193, 209, 211, 217, 219, 222, 224, 238-240, 275, 277, 286, 288, 291
inbound tour operators 166, 168, 170-171, 173-175, 177-178
India 4, 6, 66, 81-90, 92-93, 116, 119-120, 122, 126, 147, 151, 166-168, 170, 174-175, 177-178, 183, 217, 219-221, 230, 239-240, 243, 248, 273-275, 284, 286-287, 290, 293-294

Information and Communication Technologies (ICTs) 104, 165
Information Search 100, 121, 136, 148
Infrastructure-Driven Economies 29
Innovation 15, 29, 49-50, 57-59, 64, 122, 146, 149, 185, 205, 208, 210, 263, 287
Innovation-Driven Economies 29
Intermediary 4, 9, 66, 80, 86, 91, 117, 133-134, 136, 222
International Openness 15-16, 26, 29
Internet 32, 36, 50, 66, 81-86, 92, 100, 104-105, 108, 110, 116-117, 119, 123-124, 126, 133-134, 136, 139-141, 145, 148-150, 153-154, 158, 161, 185, 219-225, 227, 239-240, 243, 252-253, 265-267, 269, 272-276, 281

K

KidZania 48-49, 52-59, 64
Knowledge-Sharing 184-189, 191-193, 195, 200

M

marketing strategies 48, 50, 52, 86, 104, 123, 139, 150, 160, 166, 170, 175, 177, 240, 242, 251-253, 257, 261-262, 264, 267-269, 271, 273, 275-276
Medical Tourism 81-90, 92-93, 100, 154
Medical Tourism Facilitators 81-82, 85-86, 88, 93, 100
Medical Travel 81-91, 93-94, 100
Medical Travel Agencies 82, 88-91, 100
Medical Traveler 81, 100
Ministry of Tourism, Government of India (MOT) 166-168, 170, 173-175, 177-178, 183
Mintiples 13
Multilevel Models 29

O

Online Travel Agency (OTA) 13, 41, 116-121, 125, 132, 137, 158, 216-217, 223, 226, 231
Online Travel Agents 124, 202, 216-217, 221-223, 226-227, 231, 237
Online Visual Merchandising 216-217, 223-224, 226-227, 230-231, 237
Organizational Barriers 184-185, 189, 193, 200
Organizational Citizenship Behavior (OCB) 80
Organizational Performance 65, 67, 71, 74-76

P

perception 56, 69, 106, 124, 145, 166, 168, 170, 173, 175, 177-178, 189, 208-209, 240, 274, 284, 286-287, 289, 294, 299
Price Competitiveness 6, 15, 26, 29
Prioritization 15, 26, 29
Private Tourism Sector 215
Public Tourism Sector 204, 211-212, 215

R

Resource-Based View 14, 16, 29, 54
Resources-Driven Economies 29

S

Sales Techniques 251-252, 267, 269, 271
Search Bar 216, 227, 237
Self-Enhancement Theory 66, 75, 80
Service Quality 101-102, 106-108, 110, 115, 167, 177, 225, 259, 274, 277
Sharing Economy 30-32, 36-38, 41-42, 46
Social Exchange Theory 66-67, 75, 80
Stakeholder 52, 57, 166-168, 285-286, 293, 299
strategic intent 144, 147
Sustainability 4, 15, 26, 29-34, 38, 41-42, 46, 52, 54, 56, 93, 109, 122, 148-149, 157, 205, 208, 226, 287-288
Sustainable 15-16, 29-38, 40-42, 46, 55, 57, 84, 101, 146, 156-157, 165, 168, 201-206, 208, 211-212, 222, 277, 284-290, 293-294, 299
Sustainable Development 16, 29, 33-36, 41, 157, 165, 205, 208, 284-288
Sustainable Tourism 30, 32, 34-36, 38, 41, 46, 146, 156, 201-206, 208, 211-212, 284-290, 293-294
SWOT Analysis 120, 125, 132

T

Task I-Deals 67, 80
Tour Operation Industry 7, 144, 165
Tour Operator (TO) 2-7, 9, 13, 30-31, 33, 36-37, 41-42, 46, 48-51, 56, 64, 101, 103, 105-106, 115, 132-134, 144-145, 147, 165-166, 168-171, 173-175, 177-178, 200, 202-203, 206, 208-210, 212, 215, 239-241, 251-253, 261, 264, 267-269, 271, 288, 293
Tourism 1-7, 9, 13-15, 26, 30-38, 41-42, 46, 48-52, 54, 56-59, 66, 81-94, 100-106, 110, 115, 117-118, 120, 122-123, 132, 134-136, 138, 140, 144-161, 165-170, 173-175, 177-178, 183-185, 187, 191-195, 200-212, 215, 217, 219-222, 225, 230, 239-240, 242, 251-253, 257, 260-262, 264-268, 273-274, 277, 284-291, 293-294, 299
Tourism Companies 89, 184-185, 187, 191-195, 200, 208

Tourist destinations 145, 148, 151-153, 156, 209
Traditional Travel Agent 13
Travel 1-7, 9, 13-17, 25-26, 29, 31-32, 34-39, 41-42, 46, 48-50, 56, 64-67, 69, 75-76, 80-94, 100-103, 105-110, 115-126, 132-141, 144-155, 157-161, 165-168, 170-171, 174, 177-178, 187, 200, 202, 205-206, 208, 210, 215-223, 226-227, 230-231, 237-243, 245-248, 251, 253, 257-259, 261-262, 264-265, 267-269, 271-275, 278-281, 284, 286, 293, 299
Travel Agency (TA) 1-4, 6-7, 9, 13, 41, 48-50, 56, 82, 87-91, 100-101, 103-105, 107-110, 115-121, 125, 132-141, 144-145, 147, 158, 160, 165, 168, 177, 200, 206, 215-219, 221, 223, 226, 231, 241, 245, 251-253, 257-259, 261-262, 264-265, 267-269, 278, 293
Travel Agency Sector 101, 103-104, 109, 115
Travel Agent 3, 9, 13, 88, 90, 104, 110, 134, 136, 138-141, 216, 218, 223, 227
travel and tourism industry 34, 56, 103, 140, 159, 205, 217, 219-221, 230, 239
Travel Decision 238, 241-242, 245, 247
Travel Trade Industry 272, 274, 279-281
Traveler 13, 32, 46, 81, 100, 137-139, 145, 150, 210, 220, 238-241, 243, 245, 248

W

Word of Mouth (WOM) 161, 165