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*"How tourism industry is changing thanks to the Web – a general overview:
traditional and online travel agencies, their new marketing strategies, the
influence of consumer generated media and the future possibilities for this
sector."*

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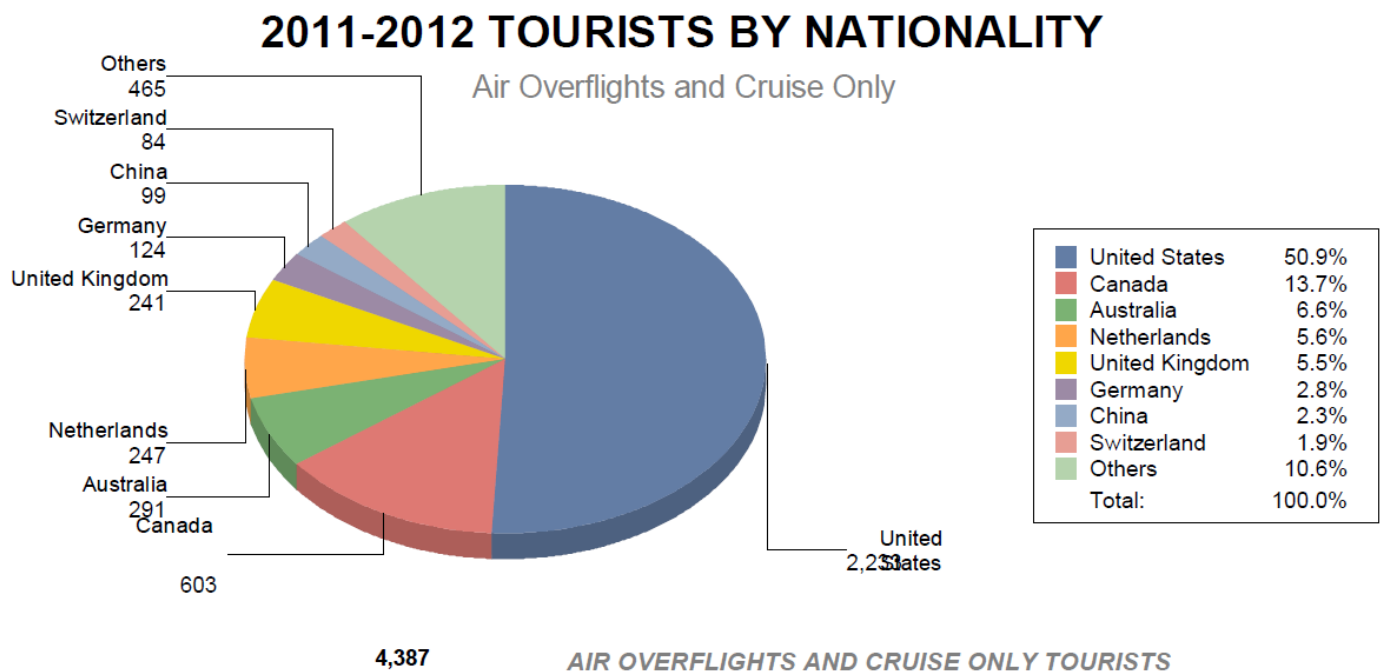
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Introduction

No one can deny the increasing importance of Internet, in every single aspect of our lives. The broadcast of new technologies is changing our behaviours, it influences the way in which we communicate with other people and so many aspects of our everyday that it's impossible not to think about it. Buying and selling on Internet has reached ubiquitous proportions. Thanks to Internet and the web, the way in which firms deal with customers has changes too, e-commerce is a new and promising paradigm for the distribution of retail products and services, and each industry in the economy has to care about it, to be up-to-date and respond quickly to new requirements and needs of clients. Internet has become the preferred platform for many business models, and it's so important because it provides a convenient and efficient channel for distributing retail product/services. We are going to analyze the travel industry, particularly interesting considering that the situation in this field has changed a lot during the last few years, and Internet has penetrated the decision making process of travel (87% of travellers use the Internet to look for information during their travel planning); few years ago a lot of studies said that travel industry had the greatest potential to adopt e-commerce, and in fact purchasing online travel products has become the most successful business of e-commerce. The role of traditional travel agencies is not the same anymore, people can easily book online their own travel, tour operators' websites are spreading really quickly, and the same counts for travel blogs, which are becoming a preferred travel information source. Even when travellers don't make their reservation online, they visit online travel websites to find specific travel information, and the use of online travel services is now the most popular way consumers purchase their travel tickets and other related conveniences. If you work in this industry, it's impossible not to think about the possible implications that these changes bring to your job. We are going to focus on the marketing aspect of tourism industry. For an online travel agency is fundamental to have a strong and accurate marketing strategy that can let them attract the highest number of possible customers, especially because of the fact that the competition is really hard. The situation is changing rapidly and the global crisis doesn't help this sector, so we have to think about strategies and solutions to reach the target that we have established and deal with a lot of different aspects that can interfere with tourist industry. Finally we re going to analyze which are the new opportunities for this sector, the importance of becoming 'green' and facing new challenges with the consciousness that the world is changing a lot.

1. The current situation

We are going to analyze the current situation in travel and tourism sector, to obtain a general overview of this industry and understand easily why this sector is so important for many countries. It already accounts for 9% of global economic activity, a total of US \$ 6 trillion, and it provides 120 direct jobs and 125 million indirect jobs in related industries¹. Luckily the global economy is showing signs of fragile and slow recovery, but the world is becoming increasingly complex and interconnected, and the industry is dealing with this. An important fact to report is that the number of travelers has increased consistently during 2012, and international tourist arrivals grew by 4 % during the past year (forecasts say that arrivals will continue to increase by 3 or 4 % in 2013), and total expenditure on tourism has also increased.



The sector has benefitted from the continuing globalization process: travel has been increasing in mature markets and, particularly, has been driven by the rising purchasing power of the growing middle class in many developing economies (as Brazil, China and Indonesia for example). The importance of tourism has been recently emphasized for many different reasons; this sector can be considered as a vehicle for job creation, economic growth and development. Travel & Tourism has continued to be a critical sector for economic development and for sustaining employment, in both advanced and developing economies. As direct consequences of its impact, we can account for the raise in national income and the improvement in the balance of payments, and as indirect consequences it provides the basis for connecting countries,

¹ "The Travel & Tourism Competitiveness Report 2013", World Economic Forum 2013

through hard and soft infrastructure (attributes that are critical for a country's more general economic competitiveness). The following table provides a list of countries and their travel and tourism competitiveness index, to measure factors and policies that make it attractive to develop T&T sector in different areas.

Country/Economy	2013		2011
	Rank/140	Score	Rank/139
Switzerland	1	5.66	1
Germany	2	5.39	2
Austria	3	5.39	4
Spain	4	5.38	8
United Kingdom	5	5.38	7
United States	6	5.32	6
France	7	5.31	3
Canada	8	5.28	9
Sweden	9	5.24	5
Singapore	10	5.23	10
Australia	11	5.17	13
New Zealand	12	5.17	19
Netherlands	13	5.14	14
Japan	14	5.13	22
Hong Kong SAR	15	5.11	12
Iceland	16	5.10	11
Finland	17	5.10	17
Belgium	18	5.04	23
Ireland	19	5.01	21
Portugal	20	5.01	18
Denmark	21	4.98	16
Norway	22	4.95	20
Luxembourg	23	4.93	15
Malta	24	4.92	26
Korea, Rep.	25	4.91	32
Italy	26	4.90	27
Barbados	27	4.88	28
United Arab Emirates	28	4.86	30
Cyprus	29	4.84	24
Estonia	30	4.82	25
Czech Republic	31	4.78	31
Greece	32	4.75	29

As you can see, Europe remains the leading region for travel and tourism competitiveness, and Switzerland maintains its top position thanks to its infrastructures (almost the best in the world), its hotels and other tourism-related facilities. In this country natural resources are well managed, a large percentage of the country's land area is protected, and if we combine the environmental conditions with security regulations provided here, we can understand why Switzerland takes the first place in this rank.

In recent years, the environment in which countries compete for international visitors has become increasingly challenging. Economic shocks, political instability, and natural disasters have significantly affected tourism in many countries that previously experienced strong growth in their tourism economy; the industry has responded to the changing environment with a number of structural adjustments. During 2012 there was an explosion of the number of alliances, mergers, and strategic investments both in the aviation industry and in online travel services. Let's analyze deeper changes in this sector due to the spread of technologies and Internet diffusion.

2. Changes in travel industry

Travel is the largest flourishing e-commerce category. Tourism researches have emphasized the importance of the Internet on travel and tourism in general, and on the distribution of products and services in particular. For quite a long term, the travel service business had not witnessed any major change and was deeply wired in tradition. But over the past decade, the influence of ICT (Information and Communications Technology) is easily visible in this industry, and online bookings have grown in leaps and bounds. In particular, changed a lot the way in which services are distributed into the market, but the whole structure of travel service market has been renewed, and the business redesigned and transacted to fit this new situation. According to "New Media Trend Watch"², since 2009, the number of leisure travelers using their mobile devices for travel information has increased by over 450%, and a great deal of these users ends up making their booking via mobile devices (for example, mobile devices ,including tablets, account for over 20% of travel bookings in the USA). Business travelers use their smart phones to find local attractions, get navigation assistance, have access to supplier agencies and read users review. Even the way passengers buy travels will change. By 2015, both airlines and airports expect the web and the mobile phone to be the top two sales channels. Passengers are asking for a more personalised buying experience, and the industry is responding. This is why is so important to analyze the situation and be up-to-date.

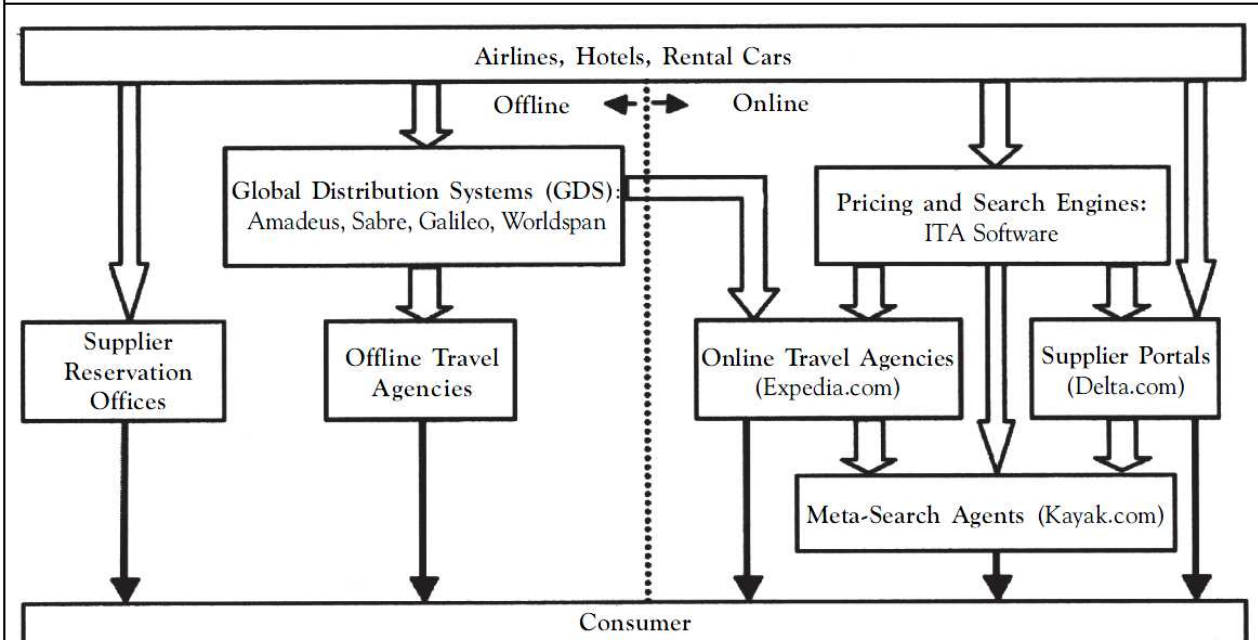
² <http://www.newmediatrendwatch.com>, provided by the European Travel Commission

Another reason is that the number of international tourist arrivals is growing exponentially in the next years (1000 million passengers in 2010, 1600 million passengers in 2020) according to the forecast of United Nations World Tourism Organization. This incredibly rapid growth of tourism industry requires sophisticated instruments to manage tourism traffic, and Internet and Information Technologies can be considered a useful electronic intermediary to respond quickly to customer demand, as well as new communication and distribution channel for tourism industry. By using the communication capabilities offered by the Internet, marketers can enhance capabilities to build and maintain relationship with the end customer.

The situation is changing worldwide, but in some areas a lot of possible customers are approaching to online bookings and this can be a golden opportunity for online travel agencies. The Middle East travel industry is recovering, after a period of stagnation; the travel market increased 12% in 2012, and probably in two years we will see a double-digit growth. In this region online booking will nearly double between 2011 and 2014, and this industry involves a great amount of money (the online travel market will approach US \$16 billion). An interesting emerging market is Latin America and Asia Pacific; moreover in India the middle class started using credit cards to book travel online, and this gave a boost to the market.

Internet offers new and cheaper ways to distribute travel products (Chakravarthi and Gopal, 2012). Suppliers develop online portals to offer their inventories of airline seats, hotel rooms, rental cars, and a lot of related services. These portals later become the disintermediators of travel agencies and GDS (Global Distribution System, a hub connecting major travel agencies, car rental companies, airlines, hotels and leisure resorts; today, major computerized bookings and reservations happen through the GDS.) since they are used to deal directly with the consumers. They act as an electronic extension of the suppliers' reservation offices, which are available for consumers who prefer to purchase their products directly. As travelers can tap several channels and different media in conjunction and simultaneously, providers have to ensure that their services are present on all relevant channels. Suppliers (airlines/rail corporations) believe they no longer need an intermediary to sell their products.

Figure 1: US Travel Distribution Information Value Chain



Recently travel suppliers have aggressively promoted direct booking through their websites, with the main purposes of reducing product distribution costs and promoting brand recognition, to interact easily with customers. But developing supply chain relationship can help to minimize transaction costs, lower uncertainty, share market information, and aid in distribution channel efficiency. The first crucial step to develop a powerful e-commerce business model is providing computer systems that integrate travel businesses with suppliers, distributors, and retailers.

For travelers, the internet allows direct communication with tourism suppliers facilitating requests for information, and allowing services and products to be purchased at any time and any place. During 2011, the majority of clients who bought travel products online, made purchases through online travel agents (50%), followed by search engines and websites of tour operators. The landscape is highly competitive, and the site traffic is expected to grow (competitiveness and performance are two aspects strictly related to the Internet spread, if you want to excel in the market, you must consider them). The main actors are online travel agencies (OTA), but even supplier websites and tour operators play a very important role. Thanks to OTA's consumers can check the accommodation availability, compare the prices and other related benefits and pay for the services using available payment modes. OTAs are so important because they provide convenience and have the ability and possibility to find the best value for the travel needs of customers. In this case Internet is powerful because it supplies transparency without comparison into schedules and fares offered by agencies, so that clients can easily switch from one website to another one and find by themselves the best solution, or commit online agencies to find a proper solution related with their needs and desires.

Table A2: Comparing Customer Behavior and Related Dimensions		
Parameter	Traditional Channel	Internet Channel
Pre-purchase search	Depended for information on vacancy availability, etc., on newspaper/radio reports.	Has access to real-time seat availability information much in advance and on a continuous basis.
Alternative evaluation	Not easy due to the fact that information is a premium and involves effort to gather.	Easy because of information availability. Hardly any effort is required to gather information and compare at the same time.
Customer experience during purchase	Personalized approach of the clerk or booking agent—no assurance on the quality of customer service provider interaction.	Non-personalized experience. Only the website interacts, and as such, interaction is minimized and kept limited to the process.
Customer satisfaction	Low to high (will depend on quality of service interaction).	Moderate to high, provided technology supports the process in easy transaction closing.

Table A2 (Cont.)

Parameter	Traditional Channel	Internet Channel
Service variability	High because of the people element but customers tend to trade off flexibility with new learning, i.e., migrating to the Internet. Resistance to shift is higher.	Low to negligible, depends on bandwidth issues.
Service provider employee behavior	Highly visible and can affect customer perceptions.	Almost negligible.
Cost of operations	High.	High investment initially but are easily spread over.
Transaction time	High because of variability in employee efficiency.	Less but will depend on internet speed and the service providers' network.
Customer learning	Limited, as he is dependent on the service provider from start to end of the process.	High as he has to independently take charge of the situation. The consumer learns by trial and error.
Convenience	Low-moderate.	High.
Service feedback	Did not exist or were not considered important.	Possible because of technology, but will require a lot of investment in CRM processes.
Customer investment	Low.	High (as he invests in the hardware).

A great contribution to this recent growth is given by the so called “generation y”, that includes people born between 1978 and 2000. Two phenomena that are setting in into the web are social networking and consumer generated media, and travelers are in very close contact with these mainstream. A research discovered that 71% of customers are influenced by CGM: Tripadvisor is a common example of this source of travel research, which focuses on travel reviews.

One of the main topics that people working in this sector have to deal with is the fact that this market is characterized by limited loyalty. If online travel agencies and supplier websites want to attract and retain profitable consumers, they have to focus on web analytics, understand deeply customer behavior and try to get a feedback from their clients, to improve their services and obtain visibility.

There are not only benefits related with the growing importance of Internet role. It tends to reduce variable and tilt costs toward fixed cost, creating a huge pressure for companies to engage in destructive price competition. It widens the geographical market from local to regional or national markets, so that every seller or seller group becomes a potential competitor in the market. It becomes even more difficult to differentiate, and a too strong competition can damage the whole industry.

2.1 Online travel agencies

Online travel agencies function as traditional agencies in that they deliver travel-related products/services and provide travel-related information and various services to customer. The main difference is that traditional travel agencies can provide much more customized information by gathering and organizing information unique to their customers’ travel needs; to compete with them, OTAs have to strive to provide empowered websites more humanized, secure, and uncomplicated, which offer more customized services. We consider OTAs only those for which most of their revenue comes from online sales, to distinguish them from traditional travel agencies, hybrid agencies and airline companies, and OTAs have to be equipped with air, hotel and car rental reservation systems. The competition in this sector is getting stronger and stronger (many companies have started to offer online reservations) and marketing managers of OTAs should know their position relative to their competitors; the high level of competition imply a precise and strong strategy to shine in the market and the future suc-

cess of OTAs will depend on their ability to create targeted services and offers based on a deep understanding of local trends and customer behavior, use a lower-cost model to attract all the potential customers and reaching potential clients with comprehensive, personalized and up-to-date products and services that satisfy those needs.

To investigate deeply the important choice attributes of OTAs from which customer may select, we are going to use data collected from a study (Dong Jim Kim, Woo Gon Kim and Jin Soo Han, 2007): they analyzed and discussed 9 attributes for selecting online travel agencies, and here they are listed.

- Security: today this is one of the critical issues that Internet-based merchants are facing, and many researchers have written about this popular topic. Online retailers need to build secure websites since Internet users hesitate to purchase products or services online due to security concerns, and they can't let this happen.
- Ease of use: OTAs should compete for customers through enhanced websites equipped with more convenient and ease of use features, because convenience affects a lot satisfaction and, consequently, purchase decisions, and if the website is easy to use and customers don't have technical difficulties, they will easily conclude the transactions.
- Finding low fares: it's quite obvious that price is a crucial factor in this situation, affecting customers' decisions (60% of online consumers cite price as the top reason to purchase travel related products). And it's even possible to compare OTAs considering their ability to find low fares, a fundamental quality for their success.
- Useful and relevant content: additional contents as travel tips, maps, destination guides or travel articles are usually provided by OTAs' websites, and information that customers can find must be complete, relevant and most of all updated . Providing useful and high-quality information directly affects online consumers' intention to purchase.
- Design and presentation of the website: this feature is essential in meeting visitors' expectations, and well-designed websites provide extra benefits for companies, catching potential consumers' interest. However it's required a balance between complexity and loading time.
- Speed of website: the website of a travel agency has to load quickly, even considering the fact that there are a lot of visual materials inside. People don't like waiting on services, and the consequence of a too long loading time could be the decision of the consumer to leave the web page and interrupt purchasing process.
- Ability to book all travel services in one transaction: this feature can be considered really important by potential consumers, because in general OTAs overlap a mere online trans-

action system, and travelers have to search out their own destinations without the help of an experienced travel agent.

- Booking flexibility: with a traditional travel agency, customers can easily change their itineraries while talking with agents, but this is more difficult to manage in the case of online travel agencies. Alterations are consumers' responsibility, but some agencies have tried to solve the problem and allow consumers to change in a simply way itineraries.
- Sorting option: it includes sorting by price, airline, duration of flight, takeoff or arrival time, and other features.

After the analysis of data collected, researchers found out that among the selected nine attributes, the most critical one was "finding low fares"; usually travelers search for price information from more than one online agency and compare the prices (it's not unusual that different agencies offer similar products and services with different prices). Price sensitivity is obviously expected to increase in the online environment, due to the ease of price comparison on the Web. Consumers perceive that they get a more favorable price online than offline; convenience, price comparison and lower prices are three main reasons why Internet users buy travel products online. The second most critical attribute mentioned in the survey was security: two-thirds of online leisure travelers remain concerned with giving out their personal information online, and there are still people reluctant to buy online for security reasons. There are different kinds of perceived risks in e-tourism: risk associated with the product itself, risk associated with the Internet as the purchase mode and risk associated with the site on which the transaction is made. The cautiousness due to the risk perceived when buying online can influence travelers' decision, as choose to entrust a traditional travel agency for the holiday planning. To avoid this possibility, online agencies should develop strategies to assure consumers of the security of their websites and online transactions, and educate them to be less worried about online shopping, because new technologies can ensure a really high level of security. Online agencies should establish logical navigation schemes to meet customers' needs, so that online shoppers can easily book their holiday in that website, without incurring in error messages or problems related with the booking. It's important to provide in the website 'help' or 'search/find' options, to create a user-friendly interface, and ask to consumers if they have questions, inquiries or complains from which a travel agency can gain important information on how to improve its service. OTAs know that customer's satisfaction derives from the discounted price obtained, so they can offer special packages with special prices, customized on the costumer's needs. Online travel agencies can purchase more services related to the business travel market; business travelers are likely to use these websites more in the future be-

cause of huge savings that they can get, so OTAs should offer packages deals that can be booked quickly (business travelers want to save time with their online booking). To plan an efficient marketing strategy it's important to think about the positioning process. It means positioning a product in the mind of the customer, and it's really important for travel agencies to be able to distinguish them between each other. Emerging agencies may target business travelers who have unique attitudes, styles and behavior, to develop their marketing niche that differentiates from big and older agencies. OTAs should concentrate on a small number of attributes or factors when they build brand image or change their positions, so that their efforts will be rewarded; OTAs are striving to be the first choice in the customers' mind.

From a customer perspective, planning a holiday could be complex: you have to care about air travel, hotel stay, car rental and a lot of different aspects. Detail online vacation planning micro sites will become reality in the near future, thanks to data aggregation and all the instruments that we have to plan the perfect holiday.

Why is the hotel ranking so important? It determine the order in which hotels should be displayed for a destination market, and for online travel agencies is fundamental to have at their disposal an optimal hotel ranking, reliable for customers, so that they can generate incremental revenues. If we consider a usual shopping process, it's not so obvious that customers automatically select the itinerary with the lowest price; in the selection process there are a lot of variables that must be taken into account. Modern travelers demand high quality travel services, products, information and value for their money; they are looking at convenience and comfort at no cost/burden. A travel agency has to provide different options, and the customer will evaluate the quality of services that they offer, fares and carries on both the outbound and inbound schedules, and then take a decision.

2.2 Traditional Travel Agencies

We have analyzed the situation for online travel agencies, but what's happening in the case of traditional travel agencies? Of course, these businesses have to rethink their strategic position, and they are facing a significant challenge. The main issue is that they don't have to act just like booking agencies, but re-invent themselves focusing on areas as travel consulting and troubleshooting. If travel agents are able to reorient their business to focus on contexts that are less suitable by other channels and media, they can get a competitive advantage and survive in

the tourism industry, even if online travel agencies are really powerful. A study³ published in 2007 (Dolnicar and Laesser) has analyzed the situation in a mature travel market, Switzerland; here travel shoppers are experienced and sophisticated, there's the highest level of internet penetration in Europe and the share of frequent travelers is 68% (50% is the proposed threshold for a mature market). Furthermore travel agencies exist in large numbers in this country, so this is the perfect environment for this kind of study. It's mere fact that booking shares of travel agencies with international trips have been constantly declining over the past few years, while the share of online bookings has been on the increase; for this reason travel agencies need to reposition themselves in the market. The traveler's decision to include a travel agency in the travel planning process can be related to many different aspects: the wish to gather comprehensive information at the same type of institutions, internet's lack of trustworthiness, or the possibility to benefit from professional services and advice offered by travel agencies. Usually there are some aspects or characteristics that group people with a high likelihood of purchasing travel arrangements on the web: if travel agents are able to identify which persons prefer booking with a travel agency, which are the features that group them, they can create personalized and customized services for target groups and expand their business strategy.

From results that arose from that study, we know that people draw on travel agencies for information and booking when they are not familiar with their proposed destination; if they are aware of what they are about to expect, and they have already been there, they will not include a travel agency in their planning. Swiss tourists want to deal with a travel agency if they are planning to go in a European destination, apart from neighboring countries, or outside European borders, and they want a professional service to help them for trips longer than one week. As regards the accommodations, there are some kinds of accommodations for which people usually don't need the intermediation of a travel agency: Bed&Breakfast, youth hostel, holiday residence rented at regular terms and camping (tent, RV, camper). For high quality commercial accommodation, tourists prefer the support of a travel agency, especially for the choice of four-to-five star. Transactions with travel agencies mostly result from rather commoditized types of trips and their related activities, such as beach holidays (that make up a larger proportion of overseas travel) and city trips; it's quite obvious that trips organized

³ "Travel Agency Marketing Strategy: Insights from Switzerland" Sara Dolnicar, Christian Laesser

through a travel agency are significantly more expensive than otherwise arranged ones, but the reason is not just one: usually if you book with a travel agency, you are going to choose an accommodation with a high quality standard, because it's what you want, and the price will be higher; moreover, trips booked without intermediaries are shorter than others, and the other reason why they are even cheaper. Travel agencies do not have significant association with sightseeing trips, a really important share of the market, that attract a lot of tourists: probably the reason is that sightseeing trips result in a high number of key travel decisions sometimes not made before departure, and maybe an approach offering ongoing services beyond departure should be seriously considered as a potential business for travel agencies. As regard a socio-demographic profile of travel agencies clients, we can say that there are 2 main groups of persons who would rather include an intermediary in their travel planning: people around twenties, undertaking some sort of higher education, and people around forties, with a good commercial professional position, as arises from the study. While the market share travel agencies for older age groups is likely to be sustained, substitution by other channels and media is likely with younger age groups, considering their closer approach to new technologies and the web. Travelers want to collect information efficiently and effectively, and they are going to choose the channel that provides the best information overflow; as a consequence, it becomes a key issue for travel agencies to be able to provide that information for customers and potential clients.

So, as a conclusion, we can say that travel agencies, to keep their market share and continue their activity in the future, have to transform from intermediaries to professional intermediaries, retaining specific product portfolios (as city trips, that are closely associated with travel agencies' activity) and initiating and securing information flow to potential travelers and specific markets. Travel agencies need to expand their influence and increase their revenues along the value chain, by providing additional and individualized or destination/specific products even after the customer's departure; furthermore, they should work hand by hand with destinations, to improve their product specialization according to specific destinations chosen by customers. Finally, travelers with similar regular travel patterns and motivations could be used as target segments, whereas travelers frequently changing travel contexts may be less suitable as segments for travel agencies, so travel agents have to focus on specific target from which they can get higher benefits as revenue.

2.3 Tour operators' websites: the importance of emotional responses as a marketing strategy.

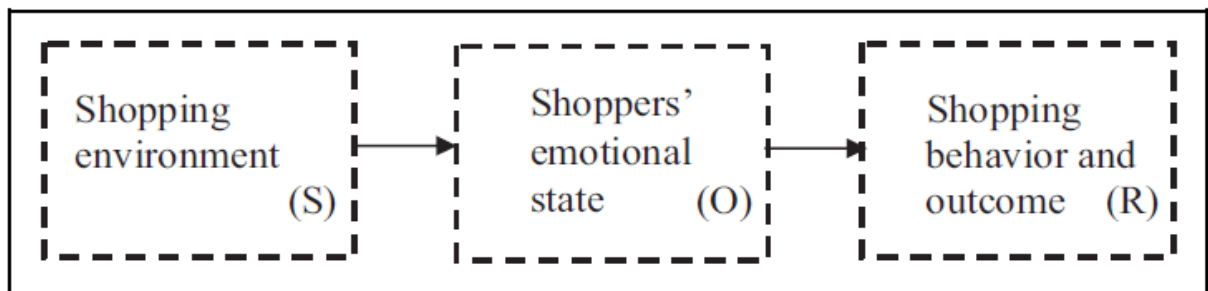
In the travel sector, a very important role is played by tour operators. As they want to differentiate from online travel agencies, they should offer to costumers and online shoppers a different service, create an atmosphere and an environment in which they can dream about their future holidays and discover unknown destinations.

The mere factor of visiting a tour operator's website and getting involved in the decision making process stimulates emotional responses. It's really important to consider this aspect when you have to create a marketing strategy suitable for the website of an online travel agency or a tour operator; the website is the first image that the agencies use to show them to customers, and if you want to attract new potential customers and create a long term relationship with them, the website is the only thing that links you. An exploratory study (Bjork, 2010) shows that atmospheric and emotional responses are linked thanks to two main elements: pictures and information content/structure. These two aspects are fundamental in projecting the layout of a website.

Website features stimulate cognitive and affective responses. Service quality theories have been extended to fit an internet context. A lot of studies on web-design provide guidelines on how to design websites and offer value-added services.

When we think about ICT and Internet related concepts, we think about mechanical process and electronic instruments, so this study is particularly important because underlines the relevance of emotions, the affective dimension that has to be accounted in. How can technology help a consumer consume his travel service with the utmost personalization? Technology cannot speak to you and website remains an interactive picture on your desktop; this is the reason why travel service websites are finding a way out and they are looking at 'humanization of technology', considering the emotional side that can emerge from a website. Travel service providers are trying to adopt technologies that can identify and intuitively respond to customers' individual needs, and this will support the ability of service providers to deliver extraordinary different experience. Consumers normally use any channel that is easily accessible and comfortable and Internet is one solution.

A positive emotional reaction can deeply influence and modify purchase behavior and even customer loyalty; there's a link between perceived enjoyment and satisfaction. The fact that environmental contexts stimulate emotional responses has been explained in S-O-R framework, a model that relates Stimulus, Organism and Responses. The shopping environment on a website is the venue for e-service experience; the virtual storefront perceived by online customers is defined by specific website features, and some of these are atmospherics stimulating emotional responses, which influence shopping behavior and outcome.



Here the importance of web design emerges. Your website has to be functioning, well organized, content rich, communicative and you have to focus your attention on the aesthetic aspects, to stimulate positive experiences. Online customers will return to a website if they are given a good experience and they are satisfied. To evaluate the quality of a website, first of all you have to consider information content and structure, and then check if the website has an userfriendly interface. There are 4 main categories to value website quality:

- ✓ Information breadth and depth (as reliability and price knowledge)
- ✓ The structure of the website
- ✓ The aesthetic dimension of the interface
- ✓ The option for interaction that enhances flow (customization, personalization)

Emotions and mood are 2 central elements of an affective response; emotions are intentional and are linked with the service atmosphere, in our circumstance website features. As already said, emotional responses can directly affect customer's loyalty, and many studies demonstrate that cognitive and affective system are strictly intertwined.

In another study (Mummalaheni, 2005) was proved that pleasure significantly influence the level of satisfaction, loyalty and consequently the number of items purchased; arousal

influences satisfaction besides time spent on the website. The results that came out of this study emphasized the importance of managing the emotional state of online shoppers: if you can create the perfect environment for shopping, and through your website you attract new customers and establish long term relationships, the topic can be a great source of revenue. Information structure, content and pictures stimulate most of all emotional response dimensions, but even website reliability and assurance influence the affective system. It's fundamental to focus on the relation that sets up between the user and the website, especially as regards tour operators' websites. Thinking about travel, it reminds you holidays and enjoyable moments, happiness and great memories, and when you visit a website that sells travel products, your emotional responses are affected by your past experiences; the marketing strategy for these kind of services has to be related with the idea that people have about travel, and the website should underline the dreaming sensation and joy related to their products.

3. Travel social network websites and brand emotional attachment

By now, the social network phenomenon is not something new, but maybe people don't think about how much a network can influence decisions and choices in everyday life. A lot of purchasing decisions are taken considering other people's opinion. The Internet is one of the most influential technologies that changed the travelers' behavior. It allows consumers to interact dynamically with suppliers and destinations and often make requests that will enable them to customize their products. It has been demonstrated that travellers never leave home without social media: more than half of today's travelling population (52%, according to MDG Advertising) relies on social media for inspiration when planning a vacation, and even more get social once they arrive; 74% of travellers use social media while vacationing.

Considering the online travel context, we should look deeper into the phenomenon of travel social network websites, explaining the marketing strategies for these new kinds of businesses, and analyzing the increasing importance that these websites have in the tourism sector.

In many studies the main topic, in which we have to focus our attention, is brand attachment: the long-term outcome of brand relationships, which is created and enhanced when consumers

develop strong emotional bonds with brands. For each company is really important to care about brand attachment; we are going to understand how is it possible, in relation with these websites and the travel industry.

Travel related online social network (ONS) websites are particularly useful for 2 main reasons, as reported by Barreda et al (2013)⁴:

- offer to industry experts additional communication platforms and process of interactivity
- permit them to establish emotional bonds among current and prospective customers.

Recently online social networks have gained substantial recognition in travel and tourism context, and their influence in businesses related to this sector can't be denied. From OSN consumers can easily obtain travel related information and share their personal experiences, opinions, review on travel packages and vacations in general. These websites have the potential to attract a lot of visitors and stimulate in them the desire to travel.

According to the previous literature, through the use of travel related OSN websites there are 4 factors that influence brand emotional attachment. Here we are listing them:

- ✓ Brand image. It is a set of perceptions about a brand reflected by brand association for consumers; they develop an image through a combination of signs and messages emanated from the brand.
- ✓ Affective commitment. In the travel context, it's a long-term desire to preserve a relationship toward the travel websites.
- ✓ Virtual interactivity (VI). It refers to the level to which OSN websites members consider the information exchanged useful, the speed of inquiry fast and the communication among users influential.
- ✓ Reward activities. Members receive monetary, psychological and membership privileges. Reward system directly affects the level of commitment and visitors' intention to participate on social network; it favourable influences even brand image.

⁴ The 18th Annual Graduate Education and Graduate Student Research Conference in Hospitality and Tourism, Conference Proceedings (2013)

In that study (Barreda et al., 2013) resulted that virtual interactivity and reward activities have marked positive influence on the brand image; high involvement in communication and interactivity affect strongly commitment with the brand. Website marketers have to make sure that the level of virtual interactivity is high enough to catch the attention of website visitors. Moreover, brand image and affective commitment have a significant influence in brand emotional attachment, and all these aspects have to be taken into account (for example, paying more attention in creating and managing the positive brand image).

Industry practitioner in travel industry should focus their marketing effort on travel social network users, and they should allocate resources in creating and maintaining a high level of virtual interactivity in social network websites, hoping that will lead to a positive brand image and brand attachment.

4. How can we get utility from travel blogs: do they have a strong influence on prospective tourists?

The increase in online social networking has not only influenced the way people communicate and share information, but also gained the attention of researchers and marketer because of its potential to influence customers purchase decisions.

Blogging activity among tourists is growing (Travelblog.org and TravelPost are increasing in popularity) and represents an important new aspect of marketing communications in tourism. So many aspects have contributed to the huge phenomenon of travel blogs among which the experiential nature of tourism, the exponential evolution of technology and travellers' willingness to share information. In this way, you can easily get a lot of information and opinions from a large and diverse group of people; this is how the word of mouse works. Few years ago people were talking about word of mouth, the fact that they talk to each other exchanging information and ideas, and it could become an unpaid form of promotion: if I'm satisfied by a product that I have bought and used, I'm going to tell to someone else that it's good (if I am an opinion leader, my idea will influence a lot of other people). And the same concept could be apply on Internet, where a lot of information are exchanged and you read different opinions about products and items, so that you can have your own idea about it. Messages and opinions are quickly spread into the web, ant with the birth of blogs and other consumer generated media, this happens even quicker.

Blogs are free public web based journal (Volo, 2010); they can be considered a digital and modern form of journalism where people's experiences are gathered, and are characterized by easy access, written format and anonymity. Travel blogs can be considered as a manifestation of travel experience, and visitors' opinions posted on travel blog sites are analyzed to gain an understanding of the destination experience being expected; they facilitate powerful discussion that could finally affect customer's decision, and for this reason they represent a relevant area of customer research. Blogs are becoming a preferred travel information source, where tourists share experiences, moods and feelings. Blogs offer the opportunity to reveal tourists' interpretation of tourism products and to express tourists' impressions, perceptions, thoughts and all that may not be revealed in a more constrained research environment. Despite the fact that blogs are "self-designated authorities" and that they cannot be assumed to represent the whole population of consumers, nevertheless they are an important and, in a certain way, authoritative voice in the marketplace.

There are a lot of data that can be picked up from a blog, but are they really useful and valid for research purposes? We have to consider weaknesses that arise: the shortness of text in blogs, the difficulty to generalize findings, different problems in blog sampling and, finally, the different interpretations that people give to what they find in the blog. As regard the last weakness mentioned, experience is something really personal, and the same report posted in a blog can be interpreted in various ways, depending on the person that is reading it. Usually travellers describe many aspects of their trip, ranging from visiting attractions and enjoying the culture, to the use of tourism-related facilities. Most international tourist use blogs to report, with little emotions, an objective chronology of events, but it depends a lot on the culture (Italian tourists write about their experiences are feelings more than others).

However, there's no compelling evidence that blogs influence deeply and systematically the future travel intentions of blog readers, but their importance and spread can't be deny. Tourism marketers need to understand blogs as a new technological phenomenon with important implications for marketing and promotions of destinations. Sometimes they can be an effective and unobtrusive method of collecting data and marketing information, even better than a survey, because it's possible to analyse individual and community generated contents; they are even an inexpensive instrument to obtain rich and authentic customer feedback, hence useful to assess service quality and improve travellers' overall experiences.

5. What should we expect from the future??

Encouraging the development of Travel and Tourism today is essential, and one of the reasons to do it is its role in job creations, in a period in which many countries are suffering of high unemployment. Although economies have recovered a bit during the last period, volatility has remained a key risk to further development - financially, economically, politically, and environmentally. New demand is unfolding in developing regions such as the BRIC countries (Brazil, Russia, India, and China) and beyond, changing the profile of the international traveler. All these changes will have significant impacts on tourism destinations.

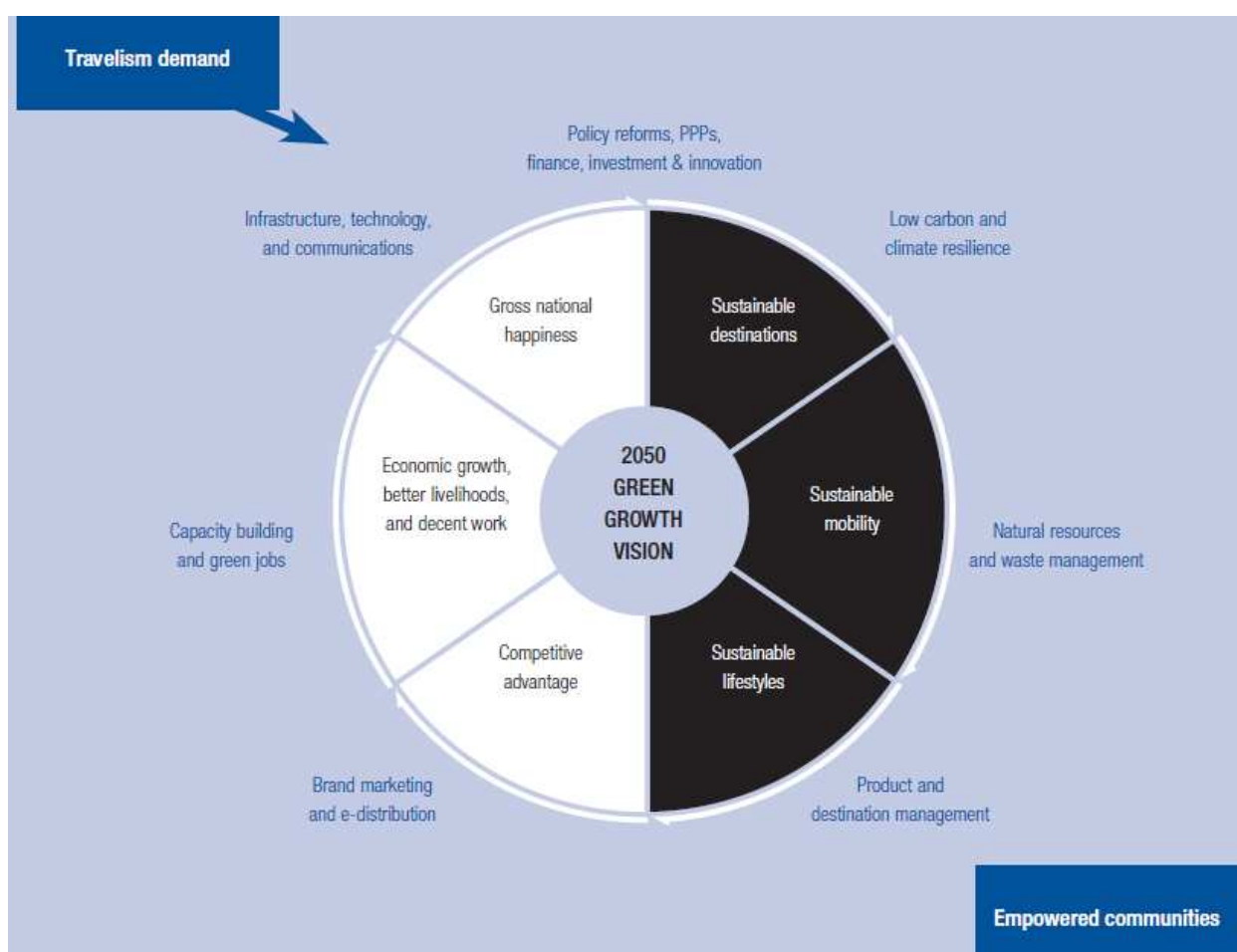
Policymakers responsible for developing and growing their nations as successful tourism destinations face a large variety of change drivers in their countries and in key tourism source markets. They will need more and more sophisticated methods to support the development of the tourism sector successfully by increasing inbound tourism.

Advertising campaign and other destination management techniques are increasing their presence; destinations have to look at their competitors and rethink their position in the market, to be able to respond to short-term demand shocks. Instability is a new reality that carries on risks but even opportunities. Policymakers need to develop long-term plans in order to best cater for inbound tourism flows. But these efforts alone do not generate true differentiation from other countries that are doing exactly the same, so they need to identify and leverage capabilities that make their destination distinctive. Each country should recognize its specific key areas of tourism opportunities and align its policy focus around these core capabilities; policymakers should generate a positive climate for tourism and tie tourism businesses closely to overall economy, supporting local communities and individual entrepreneurs.

Moreover, all the professionals in travel and tourism sector should take on the environmental sustainability question, especially if they are dealing with developing tourism countries. The number of 'green' consumers is growing exponentially, as the number of travellers that want to enjoy a travel experience without compromise the environment. A clear focus on greening the supply side of tourism as well as environmental conservation efforts on a national level will generate clear advantages over competing destinations.

5.1 The new 'green' attitude of tourism

During the last years we realized how important is focusing on green growth: governments, industry and civil society have to cooperate, with the common aim to overcome this period of economic crisis and improve the quality of the environment where we live (developing renewable energies, protecting biodiversity and thinking 'green' in all the aspects of our lives). Travel and tourism can play a much more significant role in this process, and the transformation that this new attitude can bring to the sector will be rewarded not only in the near future. How can travel and tourism contribute for a better world?



In the 2013 'Travel and Tourism Competitiveness Report' some ideas were mentioned: new transport platforms and the use of bio-fuels, new climate-proofed hotel and constructions, new green models for business meeting and new vision for educating people about the importance of a 'green' mood even planning holidays. This focus on education applies to industry employees, destination residents engaged in the visitor economy, community decision makers, and travellers themselves.

The development of the green growth roadmap for tourism should enhance long-term

competitiveness of destinations and must be compatible with national travel, transport, tourism and trade strategies. It's important to remember the main purpose of green growth is the improvement of quality of life and environmental sustainability, adapting different green solutions and strategies to different countries, cities and communities.

Some researchers (Lipman, Delacy and Whitelaw, 2012) analyzed the green economy tourism system (GETS) modelling program, which tests green growth and tourism options by integrating large and diverse datasets. It's helpful because it gives communities a comprehensive and better decision-making framework, and provide and incentive to evaluate green growth. GETS presents an approach for a decision-support system to assist destinations address challenges and opportunities in a period of rapid changes, focusing on sustainable tourism and system dynamics. Analyzing and simulating quantitative data, local tourism planners and decision makers can discuss various policy settings and simulate their impact as: expected number of visitors, amount of infrastructure, labour and training required by the destination, the amount of greenhouse gas produced. The GETS model can integrate a wide variety of data and databases coming from different organizations, and it can be very useful to forecast future scenarios and take decisions in the travel and tourism sector.

5.2 Mobile advergaming in tourism marketing – thinking about future opportunities

Talking about tourism industry, we mentioned the importance of a strong marketing strategy and the capacity to be up-to-date. A new instrument that can be used as a market communication vehicle to attract potential consumers is the mobile advergame (Celtek, 2010). These are games created by companies to promote their product in a new and interactive way, not only by simple advertising. Advergaming can be considered a useful marketing technique, and people's awareness on it is increasing because of changes in media use (for example, males find playing games more interesting than watching television, and if they like that particular game, they will spend a lot of time playing with it, without thinking about all the advertising messages that they are receiving). Furthermore, it's not just a marketing technique, but even a powerful tool to build brand loyalty and collect data about actual and potential customers. The use of an interactive gaming technology to deliver embedded advertising messages to customers is becoming a common technique among companies that have understood the increasing diffusion of mobile devices. Combining games and advertising can boost product awareness and bring to the creation of a close interaction between the brand and the customer.

There are different ways to insert advertising message in a game. First of all, advergaming are games developed especially for a brand, with a deep integration of the brand into the game (the game is specially built around the brand); as a second strategy, companies can adopt in-game placements, brand/logo placement inside an existing game; the last technique is onsite advertising, a banner advertising on gaming sites and gaming pages of portals. Branded advergaming are really useful to get your message across and to create in the customer's mind an association between the brand and something funny and unique. They can help to reach potential customers, considering that the majority of them are given for free. But the most important function of advergaming is the establishment of a strong customer relationship and brand awareness. There are different advantages that come from the use of an advergaming by a company. First of all, 86% of Internet users pass viral messages to another person, so if the game that the company has created is interesting and funny enough, soon it will become famous and popular, and the brand awareness will spread. Secondly, people spend more time playing games than watching TV, so this kind of advertising is more efficient and absolutely not annoying; moreover, it helps in understanding the preferences of clients.

The market of mobile devices is getting larger year by year, especially if we consider the youth segment: it's important that each industry deals with this fact, trying to understand which competitive advantage is possible to achieve thanks to new technology. How can mobile advergaming be related with the tourism industry?? For example, a travel agency can create a game which offers the possibility to enjoy exciting sightseeing in different cities or tourist destinations. Tourists can explore, thanks to the game, streets, squares, churches and palaces, and feel grow the wish to visit in person that particular city or place. Travel agents can obtain useful information, such as which are the destinations more attractive for tourists, which attractions they want to visit in a city or place, and create holiday packages highly customized, based on information that they acquired from the game.

Advergaming is a great opportunity to integrate marketing efforts. A travel agency just needs to create a fun mobile advergaming experience about different destinations, which can drive customers to purchase or trial, and establish a long term relationship with them.

Conclusions:

We have analyzed and given an overview of the current situation in the travel and tourism industry. As you have seen in the last paragraph, there are a lot of opportunities for this sector, even if we mentioned just few of them. Every agent that works in travel and tourism sector, or related activities, has to understand how the world is changing; they have to focus on the request and needs of travelers, choose one target segment and offer the best personalized solution for a perfect holiday.

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