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CONTENTS

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   STATEMENT OF THE PROBLEM

   OBJECTIVES

   HYPOTHESES

   RESEARCH METHODOLOGY

   RESULTS & DISCUSSION

   FINDINGS

   RECOMMENDATIONS/SUGGESTIONS

   CONCLUSIONS

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   ACKNOWLEDGMENTS

   REFERENCES

   APPENDIX/ANNEXURE

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CONTRIBUTIONS TO BOOKS

- Sharma T., Kwatra, G. (2008) Effectiveness of Social Advertising: A Study of Selected Campaigns, Corporate Social Responsibility, Edited by David Crowther & Nicholas Capaldi, Ashgate Research Companion to Corporate Social Responsibility, Chapter 15, pp 287-303.

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- Schemenner, R.W., Huber, J.C. and Cook, R.L. (1987), "Geographic Differences and the Location of New Manufacturing Facilities," Journal of Urban Economics, Vol. 21, No. 1, pp. 83-104.

CONFERENCE PAPERS

- Garg, Sambhav (2011): "Business Ethics" Paper presented at the Annual International Conference for the All India Management Association, New Delhi, India, 19–22 June.

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- Kumar S. (2011): "Customer Value: A Comparative Study of Rural and Urban Customers," Thesis, KurukshetraUniversity, Kurukshetra.

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TRAVEL SERVICE DISTRIBUTION IN INDIA – IN TRANSITION??

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HYDERABAD

ABSTRACT

Travel Planning has become less complicated and more convenient for consumers in recent times. Be it online portal or Service providers' own website or a traditional Agent, consumers have ample options to plan the booking of travel tickets. The purpose of this paper is to understand the various channels existing today that support online booking of travel services and bring out the issues related to distribution of travel services through online. Different structures co-exist, but online channel in one's travel planning is finding a major space among the available options. However, traditional channels have learnt to satisfy and retain customers, leveraging the core competencies coupled with technology adoptions.

KEYWORDS

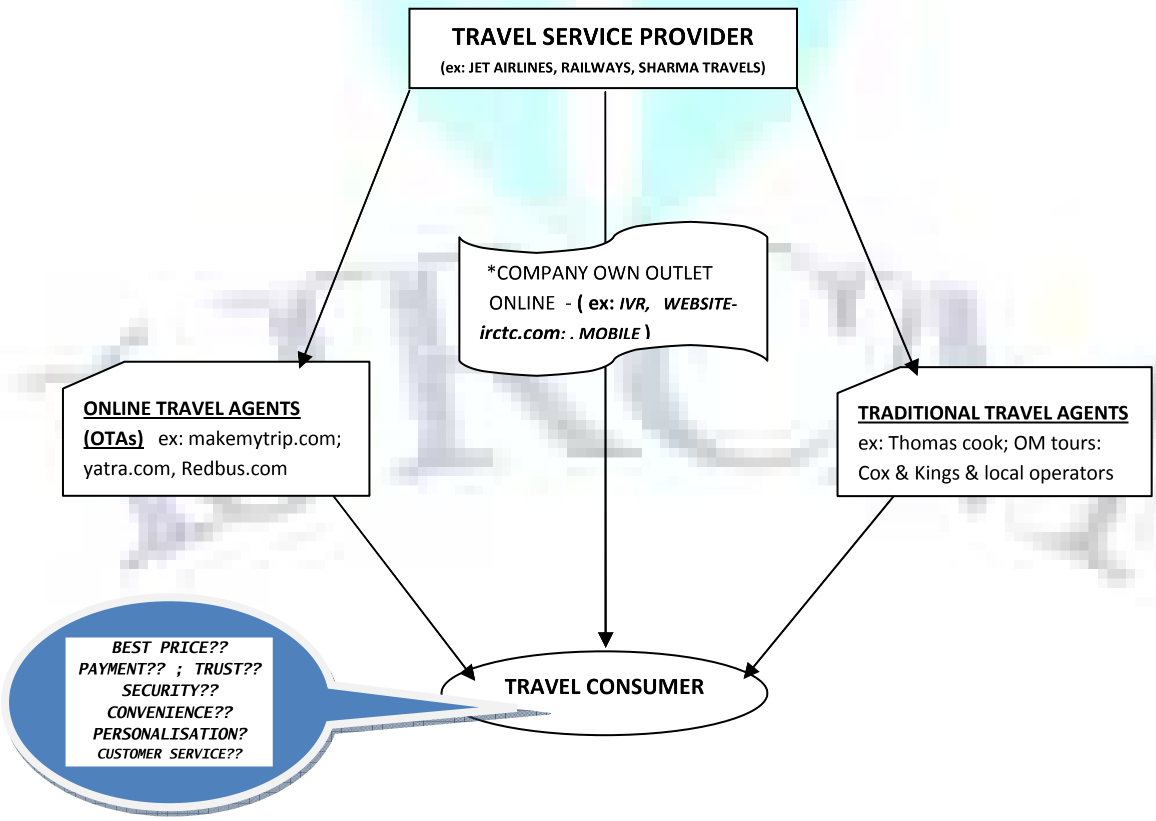
OTAs, Online travel, Travel Distribution.

INTRODUCTION

Travel Industry in India has been a major contributor for the Indian economy and has undergone tremendous changes in the recent times. Travel industry in India was predominently into Road, Rail transport and Airways. Consumers have been for many years getting their travel solutions fulfilled by a strong network of travel agents. Travel agents, who were operating initially with a brick and mortor model i.e., typically working in a outlet kind of an environment started with the minimal usage of Internet technology and more of telephone, personal interaction. Consumers were guided over telephone or through personal interaction with the travel agent, most of the times information was limited and so choice for consumer. But, with the advent of Internet and its marvelous applications, travel industry has seen a turn around the way the business is performed. The travel service providers started connecting with their customers through their own websites. This was not sufficient as consumer has very less choice of comparing and selecting the best deal and so Online Travel Agents like makemytrip.com, travelguru.com, Yatra.com etc could open their operations and fill the gap. Modern travellers demand more high quality travel services, products, information, and value for their money (Christian, 2001; Lubetkin,1999; Samenfink, 1999). Also, for travellers internet allows them to communicate directly and purchase products / services from any place and any time (Olmeda and Sheldon, 2001). This revolution has given the consumer world a greater autonomy in gaining information, selecting the required travel service more or less without interacting with any travel agent. This ofcourse also depends on the length of the trip the traveller is choosing and the complexity in the trip. The tourist purchasing behaviour differs with the length of haul (Crouch, 1994; Murphy and Williams, 1999; Tideswell and Faulkner, 1999). With such developments around, travel agents started adopting smarter ways of transacting with the consumers. Improving real world shopping experience, offering value added services, knowledge about market, supplier offerings are the points travel agents should focus on (Bedard, 2005; Law et al., 2001; Wynne et al., 2000). With a greater edge in providing personalised services, Traditional Agents started leveraging IT technology by which they can compete with the new era online travel agents. As per the report given by PhoCusWright's Asia Pacific Online Travel Overview Fourth Edition, Online Travel Market in India has reached Rs 20,490 crores in 2010 and is expected to touch Rs 32,391crores in 2012.

TRAVEL SERVICE DISTRIBUTION

Fig. 1



The travel service in India has seen a sea change in the way it operates. The change was such that there was an increase in the number of travelers as well as number of travels per traveler. Today, consumer has varied choice in booking his travel plan through many modes…it can be through regular traditional agent or can be from online travel agent or directly get into service providers website and plan his travel. But definitely, the issues like comfort, convenience, security related to payment and refund, price per ticket, personalisation, trust and the security of the credit card / personal details has bearing on the type of channel travel consumer chooses.

In a move to directly serve the customer bypassing the travel agent, Service providers like jet airlines, kingfisher etc., came out with roboust ways of reaching consumers viz., through IVR, info through SMS, Mobile booking along with the online booking facility in their own website. Service providers went ahead in announcing discounts if purchased tickets through online, which probably posed direct threat to traditional travel agents. This initially was seen in airlines, but slowly now road travels. We find service providers' websites like rajtravels.com, kesineni.com, sharmatravels.com and also OTAs like redbus.com, ticketwala.com etc. Indian railways, on the other hand initiated the disintermediation process very smartly by marketing its own website www.irctc.co.in without giving much space to any OTA in this, though few players like makemytrip.com have made dent in this direction. A phenomenal growth has been observed as many train passengers today travel with their e-ticket in hand. With the existing conducive environment in the travel industry, a stiff competition previals among the players and this may likely to affect the sales volume of traditional travel agents.

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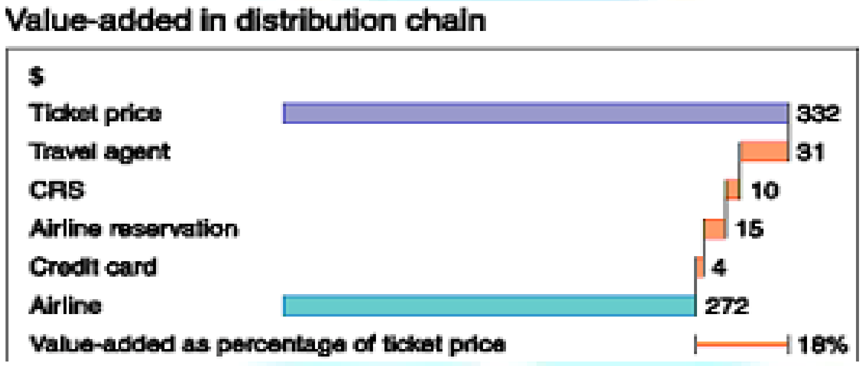
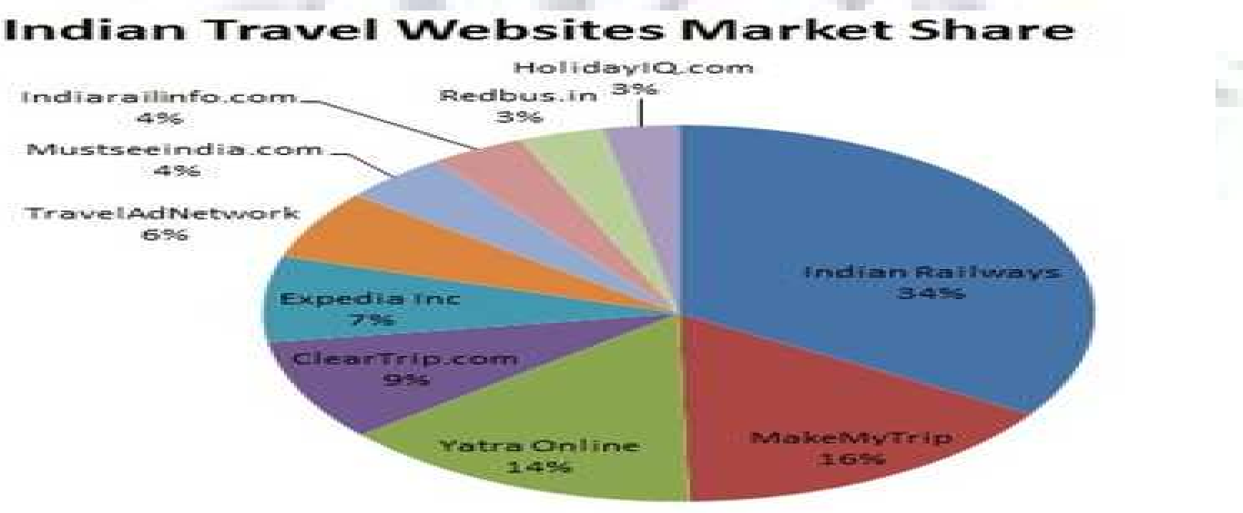
FIG. 2



Source: ComScore Report 2011

Travel service distribution is in the stage of transition with traditional channel existing along with online channels and service provider's websites providing almost similar booking solutions. In purchase of travel tickets, apprx 18% of the total value of the ticket goes to the intermediaries that operate between the Service provider and the Consumer. As heavy investments go into the capital investment for any travel service, (airlines especially) and as they get effected with higher variable costs, there is always a thought on cost reduction from the Service provider's top management. One such area where they can reduce the costs is distribution. And so many a time, Service provider tries to reduce the players in the channel so that the commission can be saved that can help to record higher profits. But, Service providers should consider the intermediaries role in performing specialized function. If the service provider can create a system (ex: irctc) that take care of all the important activities the key players in the traditional channel perform, it may be successful.

FIG. 3

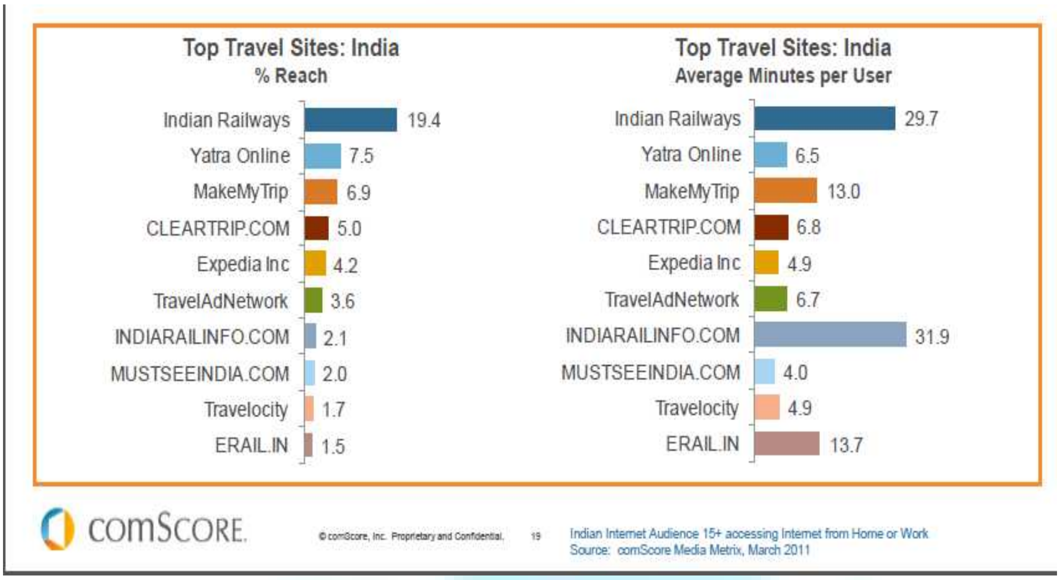


Source: ComScore Report 2011

ONLINE TRAVEL INDUSTRY & AGENTS (OTAs)

Online Travel Industry is the largest contributor to the B2C E-Commerce Industry, sized at Rs**. 5500 crores** for the year 2006-07 and was around **Rs. 7000 crores** by the end of 2007- 08. Online Travel Industry, comprises Air, Rail, Hotel Reservations; Car Rentals, Tour Packages. At 40% year on year growth, the online travel industry is a rapidly growing space, and its worth US$ 2 billion by 2008. Thanks to the IT technology and Internet usage, new business opportunities emerged and one of which was online travel agent. Online travel agents, whether it is Yatra.com, Makemytrip.com or irctc.com or even the recent one that is supporting road travel service - Redbus.com, came into existence as there was a gap that Service providers were not able to fill. Of course, this led to clear business opportunity, which was very promising. Many players identified the gap, gained the expertise both in reaching consumer and servicing with 100% accuracy. The main USP of OTAs is that they can provide consumer a plethora of choices at a single point, which makes him/her to clinch the best deal for their travel. This feature attracted customers to move towards the online travel agents, as it was more a one-stop solution for their travel plans.
According to ComScore report for the month of March, 2011- Top travel sites have been topped by Indian railways ticketing service websites – irctc.com, followed by Yatra.com, Makemytrip.com and other OTAs.

FIG. 4



According to the latest Internet and Mobile Association of India (IAMAI) report, online travel industry has grown at a rate of 81% in 2011 from 76% in 2009.
Online travel facts and figures

Source: makemytrip.com report

- Travel business Comprises half of all e-Commerce in India
- 84% of online buyers searching for online travel services
- Buyer profile**:** 28-44yrs Male; Owns car & hi-end appliances; Salaried and /or Self-employed

OPPORTUNITY

- Long tail evident - geographic spread of buyers over 500 towns
- Market expected to grow to $5 Bn by 2010
- Air product is the low-hanging fruit

CRITICAL ISSUES IN THE ONLINE TRAVEL BUSINESS

- Poor IT infrastructure both Internet & PC penetration that support online travel search, Booking and Payment.
- Low Inventory levels with respect to Bus travel or Hotels which is more or less limited.
- Limited penetration of credit cards and their usage online
- Consumer apprehensions – towards Security, Refund process, etc.,

TRADITIONAL TRAVEL AGENTS IN NEW ENVIRONMENT

Traditional travel agents had a great advantage to service customers closely and enjoy loyalty through personalisation, which can be one of their strength. For consumer, it was more a personal interaction or through telephone till date, which traditional agents were successful in. But, when it comes to comparision of prices, travel service features etc., consumer is not aware and can get proper help provided the agent has sufficient knowledge and information access. Also, the act of choosing service provider is left more with Agent than the consumer himself. This kind of a situation may be helpful for the customers who are unable to do their travel plan, but it is not for those who require choice of selecting service provider. It becomes still more complex if customer is planning for a tour package that includes car rental, Hotel etc.
With the growing usage of internet, traditional travel agents have learnt to leverage from it. Travel agents have positive attitudes towards internet applications and believe that they can take advantage of the internet technology (Law et al., 2001; Maselli, 2002). Major factors to be worked out to build confidence of travel agencies in using the internet as an effective marketing tool are - secutiry concern, tehnology needed and cost effective concerns (Cai et al., 2004, Chen and Yen, 2004; Wan, 2002, Yung, 1998). Travel agents, traditional intermediaries and tour operators are being given new roles in the distribution channel (Law et al., 2004; Nysyeen and Lexhagen, 2001; Park, 2000) and will remain secure if their advice offering capability could be strengthened by the presence of the internet rather than just being like a booking agency (Chu, 2001; Govers et al., 2000; Law et al., 2004; Ozturan and Roney, 2004)
It is difficult for online travel services to emulate the advantages offered by traditional travel agents. When things go wrong, it's amazing how much the customers want us to help them," said one New England travel agent who requested anonymity. "When you use a brick-and-mortar company, you're buying security."

- Traditional travel agencies continue to play role (Source: Las Vegas Business Press)

The traditional travel companies by improving technology can offer fantastic websites as well as personal touch that customers expect from travel agents. Nevertheless, it is easier for traditional travel agent to offer the advantages of an online travel agent, than the other way around. Definitely, the internet is going to be the there even with traditional agents.
But, while more people are booking everything online, this doesn't signal the demise of (brick-and-mortar) travel agencies. They've had to adapt, and many have done so admirably.
Cultural speculation in the online travel industry has been ignored for long. This is where Local travel advisor has an edge over the online travel agent, who relies on technology than personal touch. A local travel agent is the best source for information and support for any travel solution as he has hands-on experience and

understanding of local terrain. Simple tips like where to find, let's say finding the right beach resort in south Goa, or probably the accessories you might not want to carry while holidaying at the backwaters of Kerala is what makes the traditional travel agent a hit.

CONCLUSION

Travel service distribution is definitely in transition with Service providers continuously identifying new channels to serve customers directly. However, the process of disintermediation has its own challenges given the stake holders in the business. As Service providers cannot afford to loose the business from any intermediary, there should be a business arrangement that also encourages traditional/online agents partially, if not completely. This Model or Business arrangement to be in such a way that it provides cost benefit for the Consumer, generate higher volumes for agent (both OTA or traditional). Perhaps, this would work as a trade-off for Service providers. The more service provider directly meets and renders service to the consumer, the more profitable the business is and so every travel service provider is trying to directly get in touch with the customer. At the same time, Service providers are worried about the reach in the market.

An attempt to directly reach the consumer is carried out by Indian Railways and few Bus services, may be because less inventory to sell or there is no or less competition.

Travel Service providers with their huge investments are always on the opinion that they are providing the actual service and so they should get the higher pie than any other player in this business. Many a time, there were instances of arm-twisting attempts by Service providers with travel agents. On the other hand, we have Traditional & Online agents with their expertise of providing personalized services are continuously trying to strengthen. Also, there are lot of associations formed all over country like TAAI (Travel agents association of India), IATO (Indian Association of Tour Operators), ATAI (Association of Travel agents of India) TAFI (Travel Agents Federation of India) etc., which may object the disintermediation process, if at all it tends to happen.

The Travel distribution market may witness few changes over the years to come, some of which has already started……..

a. ***One channel member taking lead/advantage:***

(i) Kingfisher Airlines Introduces New Mobile Ticketing Solution (May 27th, 2009 - 12:50 am ICT)

(ii) Jet airlines provide IVR facility to book tickets through.

** Are we moving towards m-commerce?...if yes, Is it threat to agent?*

b. ***Takeovers & Agreements for mutual cooperation can evolve as markets are growing at a faster pace and becoming matured.***

(i) Global online travel firm Travelocity Global has acquired India's leading hotel distribution network firm Travel guru for an undisclosed amount(…Aug 18)

(ii) Cleartrip.com ties up with ItzCash for online travel booking **(***BS Reporter / Mumbai February 27, 2009***)**

(iii) Jet airways signs agreement with Travelocity for Hotel Bookings

C. Online travel agents face the heat along with traditional?

Online travel is going from Internet to mobile ie., e-travel to m-travel. This shift in technology may pose a challenge to existing players including OTAs.

With Different kinds of channels prevailing, Consumer is given varied choices for his/her travel plan. Few channels may provide Convenience more and less perceived safety and others may provide 100% security. This may provide the marketers a scope for segmentation of travel consumers and study their decision making process so as to have better marketing strategies in place. Probably, there can be studies in future on Segmentation of travel customers and so the market share or growth for OTAs, Traditional, Mobile, Online etc.

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With sincere regards

Thanking you profoundly

Academically yours

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