

令和 6 年 6 月 14 日現在

機関番号：10104
研究種目：基盤研究(C)（一般）
研究期間：2018～2023
課題番号：18K01870
研究課題名（和文）An Exploratory Investigation of Japanese Inbound Tourism Distribution Channels

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交付決定額（研究期間全体）：（直接経費） 3,000,000円

研究成果の概要（和文）：本研究は初めて日本におけるインバウンド観光の流通チャネル構造を調査した。富裕層旅行市場において、旅行者のパーソナライズされたニーズによる幾つかのチャネル特徴があることがわかった。また、流通チャネルの構造を市場側の販売・コミュニケーションチャネル、目的地側の調達・コミュニケーションチャネルの4つに分類した。さらに、社会的交換理論に基づき、宿泊施設とツアーオペレーター間のダイナミックなチャネル関係を検証した。観光産業や旅行者にとって緊密なチャネル関係は依然として重要であるが、伝統的なツアーオペレーターは市場力を失いつつあり、宿泊施設は伝統的なツアーオペレーターへの依存度が低くなっている。

研究成果の学術的意義や社会的意義

This study filled the research gap on TDC structure and TDC relationships in Japan based on SET. Apart from theoretical contributions, this study shed light on effective distribution channel strategies and concrete guidance for outbound tour operators, DMCs, and accommodation providers.

研究成果の概要（英文）：This research initially investigated the inbound TDC structure in Japan. Through in-depth interviews, we found several distinctive features of TDC in the luxury segment due to travelers' highly personalized needs. Moreover, we categorized the TDC structure into four sections, including sales and communication channels on the market side and procurement and communication channels on the destination side. Furthermore, based on the social exchange theory, we examined the evolutionary and dynamic channel relationship between accommodation providers and tour operators/DMCs. While close cooperative relationships are still important for the tourism industry and for travelers, traditional tour operators are losing their market power and accommodation providers are less dependent on traditional tour operators. Despite dissatisfaction in their relational exchanges, both sides highlighted the importance of commitment to maintain long-term healthy relationships.

研究分野：Tourism marketing

キーワード：Distribution channels TDC structure Luxury travel Disintermediation Channel relationship Social Exchange theory Tour operators Accommodation providers

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1 . 研究開始当初の背景

With increased competition in the tourism industry, the issue of distribution has become more prominent since the distribution channel, as one of the key marketing functions, is a critical determinant of the ability of tourism enterprises to achieve profits. In the tourism industry, distribution channels are particularly important because of the intangible and perishable characteristics of tourism services. Technological advances and changing consumer preferences have expanded the range of channels that tourism suppliers use to distribute their products. While previous research has examined various aspects of tourism distribution channel (TDC) in the UK, Australia, New Zealand, the US, etc., it has been ignored by researchers and even practitioners in Japan regardless of its importance.

2 . 研究の目的

First, this research seeks to contribute to filling this research gap by focusing on the inbound TDC structure in Japan and developing an effective tourism distribution strategy. Second, this research also seeks to clarify the evolutionary and dynamic channel relationship between product suppliers (hotels and ryokans) and intermediaries (tour operators and overseas travel agents). Hence, the findings of this research will practically assist managers of accommodation facilities, destination marketing organizations, and inbound tour operators in their distribution channel strategies and in their communication with overseas travel agents.

3 . 研究の方法

(1) Literature review

We conducted a thorough literature review in the field of TDC and compared extant results of TDC characteristics among different nations worldwide.

(2) Qualitative research

Based on the literature review and PI's previous working experience in the tourism industry, we developed a list of interview questions on the structure of TDC and factors affecting TDC decision-making of different types of tourism firms. Then, with the list of interview questions, we conducted semi-structured, in-depth interviews with tourism practitioners on how they developed and managed their distribution channel strategies. Those interviewees included experienced senior managers or owners from hotels, ryokans, tour operators, DMCs (Destination Management Companies), and overseas travel agencies mainly focusing on luxury tourism. Altogether we interviewed 23 representatives of overseas tour operators and travel agencies, 14 respondents from hotels and ryokans, and 9 respondents of tour operators based in Hokkaido. All the interview data were coded and analyzed via NVivo software.

(3) Quantitative research

To investigate the nature of TDC relationships and the antecedents of relationship development, we conducted a survey with accommodation providers (n=170) in Hokkaido in February 2023. The survey comprised items on relationship antecedents (i.e., communication quality, opportunistic behavior, financial and social dependence) and relationship outcomes (i.e., trust, satisfaction, commitment, and propensity to leave). The statistical analysis was conducted based on PLS-SEM via SmartPLS 4.1 software.

4 . 研究成果

(1) Findings of literature review

Through a thorough literature review in the field of TDC, we found that, unlike the research gap on Japanese tourism distribution channels, a considerable volume of studies has been conducted overseas, mainly in Western countries. Furthermore, nearly all of them have concentrated on the high-volume, low-price travel market. In recent years, the growth in global gross domestic product and high-net-worth individuals (HNWI) have caused the luxury travel market to expand. The same tendency has been occurring in the Japanese inbound travel market. Based on our findings from the literature review and in order to contribute more both to the theoretical research gap and to tourism practitioners, we decided to focus on the under-explored nature of the TDC in the luxury travel market via in-depth interviews with outbound tour operators in this market segment.

(2) Findings of qualitative interviews with overseas tour operators and travel agencies

Results indicate several distinctive features of TDC in the luxury segment due to the highly personalized needs of end users. First, outbound tour operators tend to shorten their channel by directly approaching end-user clients and suppliers, which leads to channel disintermediation within this market segment.

Second, in contrast to the previous studies addressing that internet technology or OTAs (Online Travel Agencies) exert on the disintermediation process, this study indicates that in the luxury travel market, disintermediation occurs as tour operators need to respond to the exclusive needs of high-end travelers.

Third, in contrast to the large tour operators in the high-volume, low-price market, tour operators in this segment tend to be small-to-medium-sized and have a competitive advantage against online distribution channels and giant tour operators because of their ability to provide labor-intensive, highly customized, differentiated services of high added-value. Far from being disintermediated, these small-to-medium-sized tourism enterprises rather appear to be thriving in the luxury travel segment.

Fourth, consistent with previous research, the majority of respondents reported a variety of generic functions that they perform, including information provision/consultation to travelers; identification of traveler needs; ticket/voucher-issuing facilitation; product bundling based on traveler requests; product and service booking and payment; assessment of the quality of facilities and products; traveler-supplier communication assistance. A common characteristic reflecting the role of tour operators in the luxury segment different from the high-volume, low-end segment is that they do not sell generic tour packages. The overall role of tour operators in the high-end travel market is well captured in the words of one of the interviewees: to provide clients with a “seamless, safe, wonderful trip experience”.

(3) Summary of findings on TDC structure

Since outbound tour operators are intermediaries between travelers in the outbound market and service providers in the inbound destination, we divide the TDC structure into the market and destination sides. Due to the fast development of internet communication technology, it is impossible to ignore marketing communication channels (promotion) when discussing distribution channels (place). In accordance with research on omni-channel marketing that various types of channels function interactively and synthetically, we initially incorporate communication channels stated by our respondents into this luxury TDC structure. Figure 1 paints the overall picture of the TDC structure from the perspective of outbound tour operators in the luxury travel market.

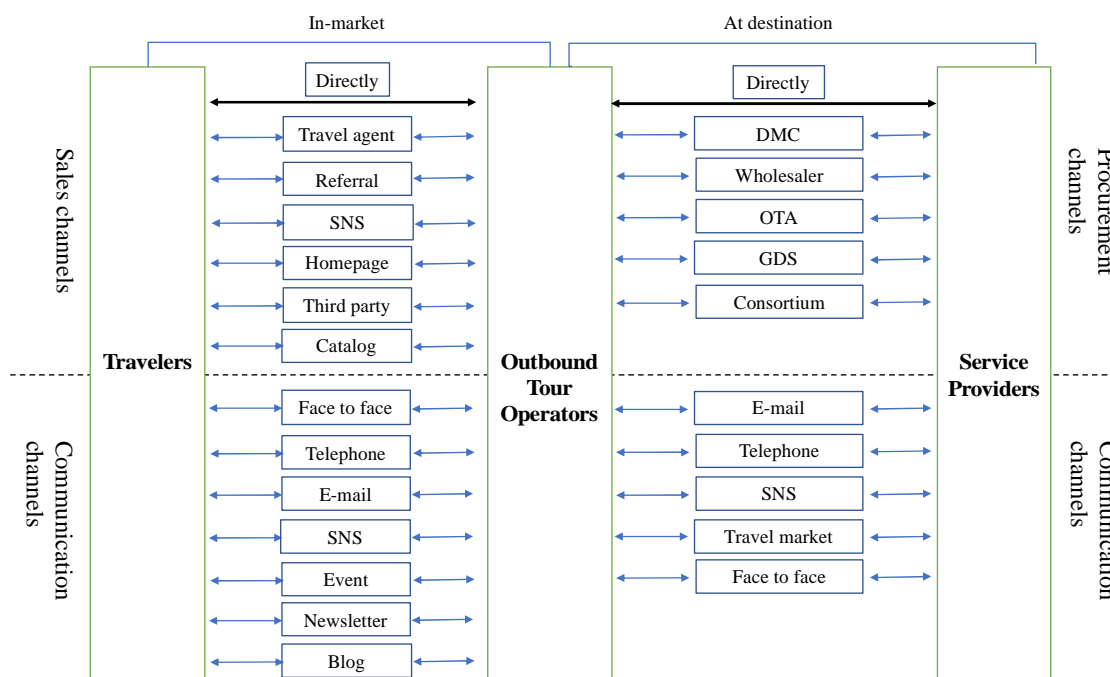


Figure 1. Structure of tourism distribution channels: the perspective from outbound tour operators

Sales channels on the market side

All 23 respondents indicated that they primarily focus on B2C sales channels, while only 7 respondents said that they complement their main B2C business with the B2B channel of approaching clients via travel agents, but that this only represents a small share of their business. Furthermore, they mentioned that they principally design customized products based on individual requests from travel agents rather than selling pre-prepared standardized tour packages through travel agents. Other B2C channels used by tour operators include referrals, corporate homepages, SNS (Social Network Service), third parties, and catalogs.

Communication channels on the market side

Communication in this study is comprised of operating communication and marketing communication. However, it is always challenging to distinctly separate one from the other in communication channels. In regard to daily operating communication, more than half of respondents report that the most frequently used channels are telephone, email, and face-to-face. In contrast to that in the mass-market, call centers are scarcely used by our respondents. Face-to-face communication is emphasized for building personal relationships. In addition, more than one-third of the respondents stress the importance of SNS (i.e., Facebook, Instagram, and WeChat) as both marketing communication and operating communication channels. Other marketing communication channels mentioned by a minority of respondents are event activities like travel shows, salons and workshops, newsletters, and blogs.

Procurement channels on the destination side

All respondents clarify that they keep good relationships with DMCs at destinations, one of the most important procurement channels. Respondents also acknowledge that only DMCs can offer them high-quality organic products and services for their high-end clients rather than other intermediaries or even themselves. On the other hand, wherever destinations respondents are familiar with or have resources directly, they primarily try to operate by themselves through direct procurement from hotels, restaurants, and transport companies, in which way they can more effectively reduce the possibility of miscommunication, manage product quality, and save cost. Other channels addressed by respondents include OTA, GDS, and the tourism consortium.

Communication channels on the destination side

Communication channels at destinations are relatively simple compared with those in the market. Most of the communication at the destination is for operating procurements. All respondents simplified that the most frequently used communication channel is email. Some respondents also elucidate that they use telephone and/or SNS (i.e., WhatsApp, Skype, WeChat) for emergent communication. In addition, some respondents clarify that they join travel markets and/or meet their suppliers face-to-face for relationship management, which functions as a marketing communication channel.

(4) Findings of qualitative interviews with accommodation facilities and tour operators in Hokkaido

In this qualitative research, we examined the TDC relationships based on social exchange theory (SET). SET is a popular theoretical framework for exploring such inter-organizational relationships because it concerns economic and social interactions.

Data were collected from tourism enterprises in Hokkaido. Respondents included those with at least managerial positions in the marketing or sales department of tourism enterprises to ensure that they have adequate professional experience and understand the current research topic. Altogether we interviewed 14 respondents from accommodation facilities and 9 respondents from traditional tour operators based in Hokkaido.

First, regarding the relational exchanges, most respondents identified both negotiated and reciprocal exchanges in the relationship between accommodation providers and tour operators. As hotels or ryokans in Japan engage in business with tour operators based on implicit rules, practices, and socializing interactions instead of signing formal contracts, respondents perceived their negotiated exchanges as mainly non-binding. In terms of resources of exchange, most respondents confirmed both economic and social outcomes in their relationships. Other than basic business transactions and sales contributions, respondents also strengthened other types of economic outcomes, such as knowledge, information, and advertising. While social exchanges are mainly referred to as reciprocal actions, they have been specified to be crucial for recognition, socializing, and fellowship by respondents.

Second, regarding dependence, all respondents confirmed that due to the advancement of information and communications technology (ICT), accommodation providers have long been less dependent on traditional tour operators than before, resulting in the power shift from offline to online tourism operators. Furthermore, the dependency on tour operators differs according to the scale of accommodation facilities. In addition, SMTE tour operators lack resources and seldom contribute to the sales of accommodation providers.

Third, in terms of relationship satisfaction, most respondents from accommodation providers were reluctant to explicitly reveal their attitude toward their relationships with traditional tour operators. When asked about their financial gains from the relational exchanges, most respondents reported that financial outcomes received from tour operators were not satisfying, even though they also understood that this was not the fault of traditional tour operators but the consequence of ICT development and consumer behavior changes. Furthermore, SMTEs implied their dissatisfaction with their economic exchanges with accommodation providers. Although most respondents showed a relatively low level of satisfaction regarding relationships between accommodation providers and tour operators, no respondent considered terminating the relationship with their counterpart.

This study also provides valuable industry implications for both accommodation providers and traditional tour operators. First, tourism enterprises should develop and maintain successful long-term economic/social relational exchanges and win-win relationships with each other. Both accommodation providers and tour operators must be aware of the importance of perceived relationship value through relationship exchanges, which can be achieved not only through cooperation and coordination but also on the basis of trust, friendship, personal treatment, and special offers. Second, accommodation providers should develop a consistent multi-channel strategy and pricing strategy to avoid unnecessary channel conflicts with intermediaries. Third, traditional tour operators should not rely on the old business model; instead, they should innovate themselves in order not to be disintermediated. Moreover, tour operators can also reposition themselves and target niche markets on theme tours like gastronomy, culture, art, adventure, wellbeing, etc.

(5) Findings of the quantitative survey with accommodation facilities

We developed a structural equation model based on previous studies on TDC relationships and social exchange theory. The model constructs contain relationship antecedents (including communication quality, opportunistic behavior, financial and social dependence) and relationship outcomes (including trust, satisfaction, commitment, and propensity to leave). The survey study was statistically analyzed with PLS-SEM to validate the model. The manuscript of this study has been submitted to an international academic journal and is currently under review.

5. 主な発表論文等

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3. 雑誌名 10th Advances in Hospitality and Tourism Marketing and Management (AHTMM) Conference Proceedings	6. 最初と最後の頁 269-276
掲載論文のDOI（デジタルオブジェクト識別子） なし	査読の有無 有
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〔図書〕 計0件

〔産業財産権〕

〔その他〕

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6. 研究組織

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7. 科研費を使用して開催した国際研究集会

〔国際研究集会〕 計0件

8. 本研究に関連して実施した国際共同研究の実施状況

共同研究相手国	相手方研究機関
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