HYBRID CONSUMPTION BEHAVIOUR IN SPANISH TOURISTS

Josep-Francesc Valls[1], Professor of the ESADE Department of Marketing Management, PhD

Joan Sureda [2], Professor of the ESADE Department of Quantitative Methods

María José Andrade Suárez [3], Professor of the University of A Coruña, PhD

Daniela Freund [4], professor Marketing TSI

ABSTRACT

The economic crisis has led to increased demand for low prices. In spite of this general trend, different price sensitivities continue to coexist among tourists. As a result, it is important to note that, although there is a trend towards 'cheaper' consumerism, the propensity to spend more in the presence of a series of assumptions is maintained: for example, if products are tailor-made or if they are environmentally friendly.

In this sense, the hypothesis is that, in terms of travel, the Spanish population is moving towards hybrid forms of purchasing: first, widespread demand for low prices and; second, attitudes of particular groups and in certain circumstances, attributes associated with quality for those who are willing to pay higher prices.

The aim of this paper is therefore to characterise the price sensitivity shown by Spanish travellers and to track its evolution. To this end, we shall use a series of comparative measurements carried out on the Spanish population before the crisis (2005-2007) and afterwards (2010), in relation to attitudes toward holidays and travel. The comparative analysis of these samples (over 1,000 Spanish travellers) will enable us to identify the hybridisation phenomenon in tourism and leisure consumption.

KEY WORDS: economic crisis, tourism consumption, purchasing attitudes, holiday budget, price sensitivity, value sensitivity

[1] Josepf.valls@esade.edu
mandrade@udc.es
[2] joan.sureda@esade.edu
[3] mandrade@udc.es
[4] Daniela.freund@tsi.url.edu

I. INTRODUCTION

The negative impact of the financial crisis on the decrease in tourism and leisure consumption by the Spanish has been confirmed in the following three basic aspects: average holiday budget, the number of days spent away from home, and the number of overnight stays per year. Consequently, the Spanish are demanding cheaper tourism products and offers adapted to a pre-established budget, which has been reduced as a result of the crisis.

We must also add that, in a general context, this current buyer's attitude clearly responds to greater price sensitivity already initiated as a result of the low-cost phenomenon – which appeared in 1997, before the crisis, due to the liberalisation of European airlines, creating a general attitude of predominance of price over value – but which became established and grew decisively because of the impact of the current economic recession.

The advent of low-cost companies and what was consequently set in motion has brought about an essential change in consumer price sensitivity, to the point that this has become a determining factor in Spanish tourist decision-making (Valls *et al*, 2008).

However, in such a heterogeneous market as the tourism market, great differences clearly exist in price sensitivity for tourists. We should, therefore, highlight that this consumer attitude towards cheaper products occurs at the same time as the tendency to spend more remains intact in a series of suppositions. For example, if tourism products are customised, if they are environmentally friendly, if they are exclusive or belong to a prestige brand; in these cases, customers are willing to pay more. In this respect, the role played by price in the tourism sector is especially complex due to existing diversity among tourists and, therefore, to the different price sensitivity they show (Nicolau, 2008).

Under this premise, this paper sets out to demonstrate that, given the widespread tendency to cut travel costs as a result of greater price sensitivity, a series of buyer's attitudes from before the crisis, associated with certain quality criteria, have remained unchanged. In the aforementioned cases, the tendency to spend is clearly greater and breaks away from the general low-cost tendency.

This would demonstrate that, as far as travel is concerned, the Spanish are moving towards a hybrid buyer's attitude: on the one hand, a widespread demand for low prices, and on the other, attitudes of certain groups and in certain circumstances, associated with quality attributes for which they are willing to pay higher prices.

Based on this, the aim of this paper is to define price sensitivity in Spanish travellers and become familiar with its evolution.

We can, therefore, put forward the following hypotheses

Hypothesis nº 1: **Widespread consumer behaviour favouring cheap tourism products** remains prevalent among Spanish travellers and responds to heightened price sensitivity.

Hypothesis nº 2: **The tendency to spend more in the following suppositions remains intact**: tourism products which are customised, eco-friendly, exclusive or tourism products belonging to a prestige brand.

In order to demonstrate the mentioned hypotheses, we will use a series of comparative measurements carried out on the Spanish population before the crisis (2005-2007) and after the crisis (2010) regarding their attitudes towards holiday and travel. The comparative analysis of these samples carried out on more than 1,000 travellers will enable us to identify the hybridisation phenomenon of tourism and leisure consumption in all its magnitude.

The usefulness of this research lies in its capacity to reveal to tourist destinations, and to the tourism and leisure industry in general, to what extent Spanish travellers are prepared to buy more expensive tourism products in a period of great price sensitivity. In this respect, knowing the impact of price on consumer decision-making is essential for managers.

In order to achieve the aforementioned objectives, this paper is organised as follows: we will first make a brief overview of the main variables that exert an influence on consumer behaviour in tourism. It is worth mentioning that most explanatory models for tourism demand have regarded price as the main economic variable along with income and the exchange rate. We will then go on to review the role played by price and price sensitivity in the tourism sector; we will then present the research methodology and, finally, the results and conclusions with their implications for management.

II. APPROACHING THE VARIABLES AFFECTING CONSUMER BEHAVIOUR IN TOURISM

There are several models that have been developed in an attempt to explain tourist behaviour, inspired in the classic consumer behaviour models; in this context, we need to highlight that several researchers have come to the conclusion that the travel buying process by potential tourists is not made up of one unique stage, but has several phases (Clawson & Knetsch, 1966; Gunn, 1972, 1988). Consumer behaviour in tourism, therefore, should be understood as an experience consisting of a set of structured experiences in five stages (Bigné, Font & Andreu, 2000: 222), which are shown in Table 1.

1st stage: The tourist recognises the desire or the need. The tourist decision-making process arises from a need and results in a series of tourism motivations, which lead the consumer to search for information that enables him/her to evaluate different alternatives that satisfy his/ her needs.

2nd stage: Searching for alternatives and information. The information obtained is an ongoing process that is derived from sources which are internal and external to the decision-maker.

Several studies have focused on the relation between information source and destination choice (Woodside & Lysonski, 1989; Um & Crompton, 1990; Mathieson & Wall 1992). Another school of thought in research has analysed the importance of information sources in decision-making (Gitelson & Crompton, 1983; Capella & Greco, 1987; Goodall, 1990; Baloglu, 2001; Gursoy & McCleary, 2003).

3rd stage: Evaluation of alternatives.

4th stage: Purchase and consumer decisions. In the context of holiday choice and holiday decision-making, potential tourists shape their preferences among destinations from a set of choices and begin to tend towards a specific destination choice.

5th stage: Post-holiday evaluation. Once tourists return to their daily routine in their places of origin, they evoke the trip in their own homes by bringing back with them memories, experiences and material objects (photographs, videos, etc) of their stay in the tourist destination. These will be objects that recreate their holiday destination in their country of origin in this final stage of the tourism process.

From the perspective of tourist behaviour in destination choice, different authors (Goodrich, 1978b; Mouthino, 1987; Woodside & Lysonsky, 1989; Fakeye & Crompton, 1991; Mansfeld, 1992; Gartner, 1993; Milman & Pizam, 1995; Court & Lupton, 1997; Um & Crompton, 1999) have put forward models that set out to explain this behaviour by establishing that several factors related to marketing variables, external factors (culture, social class, reference groups and economic factors) and internal factors (motivations, perceptions, attitudes, experience and learning, or personal characteristics) give rise to certain decision-making mechanisms that result in the choice of a particular tourist destination.

Moutinho (1987) tried to bring together these influences and structures in the form of a consumer decision-making model, illustrated in Table 2.

We now put forward the three kinds of variables that affect the tourist decision-making process: marketing variables, external factors to the decision-maker, and internal factors (Vázquez & Trespalacios, 1994: 33):

a) In relation to marketing variables (product, price, marketing, communication, etc.), these attempt to channel needs towards the demand for a specific product (Moutinho, 1987). In this respect, price is a variable of special relevance in tourism management, due to the fact that it is a flexible element that can be modified immediately (as a reaction to action taken by a competitor, for example) and become a competitive factor that enables alternatives to be compared (Nicolau, 2008).

b) With respect to external factors affecting tourist behaviour, these are according to Moutinho (1987): culture, social class, reference group influence, and economic factors.

c) As for internal factors, these include socio-demographic factors (gender, age, educational level, and lifestyle), motivations, perception, attitude, and experience or learning.

III. PRICE SENSITIVITY FROM A PERSPECTIVE OF TOURISM CONSUMPTION

In the strict sense of the word, price is "the amount of money at which a product or service is valued". In a wider sense, it can be defined as "the sum of values exchanged by consumers for the benefits of owning or using the product or service" (Kotler, Bowen & Makens, 1997: 375).

On the other hand, we tend to regard price sensitivity as "the difference between price and value in consumer purchase decision-making" (De Jaime Eslava, 2007: 114). This sensitivity is associated to a series of factors, such as the unique value effect, knowledge of substitute products, the fact that you may not be the one to pay, final benefit, total cost, lost investment, or quality over price (Kotler, Bowen & Makens, 1997).

De Jaime Eslava (2007) has stated that understanding differences in price sensitivity allows potential consumers to be classified according to two references that encapsulate their reactions towards value perceptions and price sensitivity: value differentiation and making a sacrifice for the price. According to the author, if we cross "sacrifice for the price" that the customer is prepared to make with "value differentiation", four buyer types can be distinguished with different attitudes towards the price-value relationship (Table 3):

- Value Buyers: they evaluate attributes and compare them with different values and competitors. These are consumers motivated by value objects and prepared to search for and compare all that is needed to get an exact return in price for the desired contents.
- Association Buyers: loyalty to well-known brand names and those suppliers who have previously provided satisfaction. These are consumers who have identified their desires with certain brands, which they remain loyal to and place their trust in: they have developed stable relations. They will only abandon their reference brands when these do not provide tested solutions or when new suppliers give undeniable evidence that they can offer the same at a cheaper price.
- Price-based Buyers: they do not pay more for added value and only relate to prices that satisfy their minimum criteria. These consumers look for the cheapest prices, the basic, the all included, and analyse all complementary aspects before deciding to adopt them. They are not interested in the added value of exclusivity or brand name. They are disloyal by nature; on the lookout for the cheapest price.
- Convenience Buyers: they compare very little, they are driven by convenience, by physical or virtual proximity, and they buy well-known brands, from whatever the range. They are consumers who devote little time to shopping; they fret excessively about searching and comparing; they take few risks in their buying decisions because they relate to very familiar environments. It is necessary to resort to other elements in the marketing mix to change their habits because they are not excessively influenced by price.

It should be highlighted, therefore, that price is an especially relevant variable in tourism management, due to the fact that it is a flexible element that can be modified immediately (as a reaction to action taken by a competitor, for example) and become a competitive factor that enables alternatives to be compared (Nicolau, 2008).

According to De Jaime Eslava (2007), on the basis of the different kinds of benefits evaluated by each consumer and the different degree of information he/she has, price will depend on:

a) Price-value perception. Perceived value is a compromise between the benefits the consumer expects to receive from the product or service, and the sacrifice needed to pay for it. These benefits can be of two different kinds: tangible benefits (represented by physical product features, such as smooth running, reliability, durability, and saving on expenses), and intangible benefits (such as prestige, status, lifestyle and position).

b) Price-value sensitivity. This is the difference between price and value in customer purchase decision-making. This difference may arise for very different reasons, the most typical ones being: "reference price" sensitivity, sensitivity to economic value, and sensitivity to value differentiation.

c) Price elasticity of demand. Different levels of price sensitivity caused by different value perceptions of the consumers will affect what is known in pricing strategies as price elasticity.

Economic theory states that price and demand are inversely related. However, as Nicolau (2008) points out, the literature regarding price stresses the importance of the numerous dimensions of price and recognises the complex role played by price in consumer purchase decision-making. In other words, measuring the effect of price is no easy task, since several factors arise that complicate its evaluation, such as consumer heterogeneity and choice context.

In this respect, the impact of price for tourists is not as clear as in other sectors. Generally speaking, the literature indicates that response to the demand for tourism services corresponds to that of an *ordinary good*, so that as prices increase, consumption decreases (Smith, 1995; Serra, 2002). Hence, price is considered as a factor that reduces the usefulness of the destination. However, an alternative line proposes that price does not always act as a deterrent on destination choice, but can be a factor of attraction. Thus, Morrison (1996) points out that the hedonistic nature often underlying tourism consumption implies that high prices do not always act as a deterrent on demand, since the concept of "value for money", which compares the amount paid with the quality of the services received, acquires greater importance.

Price sensitivity and the importance assigned to it by the consumer are not always constant (Santesmases, 1998). In times of recession, or periods of economic problems or family economic hardship, the consumer sees his/her buying capacity reduced and becomes more price sensitive and tries to save on purchases to a greater extent, which results in price becoming a powerful tool of commercial action in these situations. In contrast, a drop in price, although generally well received, does not always manage to stimulate the demand and can be interpreted as a prelude to subsequent reductions or as a decrease in quality or product or service features, or even as a warning that the product is about to be withdrawn from the market and replaced by a better one.

At this stage, we need to recall that the classic theories on price sensitivity are created on the basis of: a) elements attributable to product or service strategy, such as value, quality, brand, and another series of physical, intangible and psychological attributes, such as promotion and publicity; b) consumer behavior, in other words the need to reduce risks when faced with the buying process, and customer loyalty (Valls *et al*, 2008).

Value: buyers estimate if expectations of benefits or the advantages they expect to receive somehow compensate the effort and sacrifice they have to make, and to what extent it is worth their while. This is how the concept of perceived value arises as a result of a global evaluation of the product based on estimating what consumers expect to receive in return for everything they sacrifice (money, time, or physical or mental effort). Price is essential in the value structure of a product or service, and is often a determining attribute in consumer choice (Kotler, Bowen & Makens, 1997). Price must tally with consumer perceived value, since if price is too high, consumers will not be willing to buy something which, in their opinion, has less value, but if it is too low, they might not buy it at all (Kotler, Bowen & Makens, 1997, Santesmases, 1998).

Quality: another factor affecting price sensitivity is product or service quality. When consumers acquire a product or service, they expect to receive certain quality content; in other words, a measure of the product capacity to ensure satisfaction of needs not fully met (Vázquez and Trespalacios, 1994), or other new ones. Consumers can verify product or service quality on the basis of their experience. In this case, price becomes a relatively unimportant variable when gauging quality. However, when consumers cannot evaluate it because of lack of information, price then becomes an important sign of quality (Stone & Desmond, 1994). Hence, the importance of price in product quality evaluation: a perceived price-quality relationship exists. Price is an indicator of quality or prestige, so a high price results in a high quality product, while a low price arouses distrust (Vázquez and Trespalacios, 1994). At the same time, certain extrinsic attributes or variables of image exist, whose presence may be interpreted by the market as an indicator of quality; for example, the brand name, the country of origin or manufacture, the number of years the company has been doing business, etc. (Vázquez and Trespalacios, 1994). In short, evidence would suggest that, under certain conditions, consumers may use price as an indicator of quality.

Brand: The brand can also be a variable that affects price sensitivity for consumers. In a paper on the role played by price in product evaluation, Ericsson & Johansson (1985: 195) came to the conclusion that "prices affect and are affected by brand quality". In this respect, Stone and Desmond (2007: 266) regard product or service price as the main variable of choice and the one that decisively establishes brand positioning.

Other physical, intangible and psychological attributes: Vázquez and Trespalacios (1994) show that the product is regarded as a set of advantages and benefits that the buyer obtains – or wants to obtain – by using or consuming the series of physical, service-related and psychological features incorporated in this product. If we add something different to the basic features thereby increasing the product value, people are willing to pay more; in other words, they are less price-sensitive.

Promotion and publicity: another factor that can have an impact on consumer sensitivity is publicity. Krishnamurthi (1985) has investigated the effects of publicity on price sensitivity, coming to the conclusion that any increase in this area generates a decrease in price sensitivity.

Search for risk reduction: Price acquires great importance during the buying process, when the consumer must choose which product or service to purchase bearing in mind maximum risk reduction.

Loyalty: Loyalty to a certain brand affects consumer price sensitivity so that loyalty becomes a significant segmentation variable and an important component for long-term brand reliability.

IV. RESEARCH METHODOLOGY

With the aim of contrasting the formulated hypotheses empirically, we propose a methodology based on a series of compared measurements carried out on the Spanish population before the crisis (2005-2007) and after the crisis (2010) regarding attitudes to holiday and travel in order to capture the price-based perception of product or service.

The comparative analysis of these samples carried out on more than 1,000 Spanish tourists will enable us to identify the hybridisation phenomenon in tourism and leisure consumption in all its scope, taking into consideration three important aspects:

-Delimitation of a greater or lesser tendency towards hybridisation in tourism consumption according to socio-demographic traits.

-Analysis of causes leading to it.

-Classification of holiday consumption hybridisation models taking into consideration consumer patterns associated to certain types of travellers.

Sample characteristics

The first batch of questionnaires funded by Edreams was conducted by ESADE Business School in the 2005-2007 period. With regard to the technical data for the aforementioned survey, we can point out the following characteristics of the set of questionnaires examined:

- Universe: 15 to 66 year-olds who have travelled at least once in the last year.
- Sample: 1,170 cases
- Sampling procedure: Stratified sampling by age shares (50% men, 50% women) and age (15 to 24: 8%; 25 to 44: 60% / 45 to 66: 32 %). Stratified sampling was also used to consider educational level, geographical origin, and main occupation.
- Sampling error: maximum sampling error for global data is ±2.87% with a confidence level of 95.5% and p=q=0.5

- Technique: internet
- Date of field study: From 1th to 20 February 2005, february 2006, february 2007

The second and final batch of questionnaires conducted by ESADE Business School, and funded by BANCOTEL, was conducted in 2010. Of interest, is the relevant technical data for this second phase of fieldwork as follows:

- Universe: 18 to 70 year olds who have travelled at least once in the last year.
- Geographical area: Spain
- Sample: 1,000 cases
- Sampling procedure: Stratified sampling by age shares (50% men, 50% women) and age (18 to 30: 25%; 31 to 43: 25% / 44 to 56: 25 % / 57 to 70: 25%). Stratified sampling was also used to consider educational level, geographical origin, and main occupation.
- Technique: CAWI (Computer-Assisted Web Interviewing -900 cases) + CATI
- (Telephone Interviewing -100 cases) in order to confirm attitudes in groups less inclined to use the Internet
- Date of field study: From 22 to 26 March, 2010

V. RESULTS ANALYSIS

Following this brief presentation of the methodological framework in which our empirical comparative tests are set, in the next section we will now proceed to analyse the evolution of price sensitivity in Spanish travellers.

V. 1. Travel evolution

On analysing the average number of trips undertaken by the Spanish, a decreasing evolution is confirmed, both in number and days spent on them.

In 2007, the average number of trips per year taken by the Spanish rose slightly (4.33 as opposed to 4.18 in 2005). However, the Spanish took an average of 3.23 trips in 2009. This average is lower if we compare it to the Survey on Spanish travellers in the two previous years. The breakdown in segments is as follows: the number of travellers taking only one trip a year doubled, from almost 10% to 25.5%; the sector taking two or three holiday trips increased from 40% to 48.8%. However, the sector of those travelling four to six times a year was almost halved, going from 30 to 16.6%, and those travelling more than seven times a year was reduced considerably, thereby gaining greater prominence.

In 2009, we can observe an important part of the population is able to make their first trip, and those making their second increases, as opposed to an average of 4.33 trips per person in Spain in 2007. What can be seen here is the incorporation of the immigrant population in the European holiday structure, thus fulfilling the initial stage of the tourism life cycle.

As for the rest of the population, the economic crisis severely hit most of the native population that were well on their way to consolidating their fourth to sixth yearly trip in different formats of long holiday, short break, weekend break or day out, so there was a backward trend here. Groups that previously stood out for taking seven or eight trips a year have been decimated as a result of the impact of the economic recession.

These are the effects of the crisis on tourism: homogenisation of travellers as a result of low-income groups starting to travel, and the decrease in high-income groups. Holiday travel has long been an essential commodity in Spain, which those who have travelled in the last few years are reluctant to give up (Table nº 4)

If we examine the time devoted to travelling, we can see that in 2009, between 10% and 15% of the European population that was used to going on holiday was forced to forego their holiday due to the crisis.

Out of the total number of days off that corresponds, strictly speaking, to holidays, religious holidays and weekends, the Spanish claim to have spent on average 19 days away on holiday in 2009. These included long periods, short stays (3-4 nights away), weekends (1-2 nights away) and day outings. We can observe the following changes with respect to the situation before the crisis in 2007: the number of Spanish people who travel less than 10 or 20 days a year has increased (from 13 to 23.8%); those travelling from 10 to 20 days has fallen from 41 to 38.1%; there is also a drop in the number of people spending from 20 to 30 days away from their usual place of residence from 27 to 29.8%; and a much greater decrease in those away on holiday for more than 30 days.

The tendency of the young (18 to 30) to travel is higher than the average when referring to less than 10 days away, and between 20 and 30 days. The rest of the demographic sectors are quite close to the general average.

A similar pattern to trips away can be seen in the holiday budget of Spanish families, which has continued to increase to the extent that one quarter of those interviewed choose to spend around ten days away (Table nº 5).

On the other hand, most Spanish people (53.4%) travel in Spain; 19.9 go to the Spanish islands; 15%, to Central Europe; 7%, to the rest of Europe; 4,8% state they have gone to Central and South America; 4.2, to Northern Europe; only 2.4% to North America; 2.2 %, to Africa and the Maghreb; and 1.1%, to Asia and the Middle East. It is worth noting the return to nearby and Spanish destinations in times of crisis. At the same time, it is worth noting the interest for Europe and the high percentage of tourists choosing to go to Central and South America, mostly to the Caribbean, attracted by its exoticism and price.

According to age groups, the older groups are more interested in the Spanish islands; young people and up to 43 year-olds in Central Europe; over 44 year-olds, in the rest of Europe; younger than 30, in the Caribbean; and the 31 to 43 age group, in Asia and the Middle East.

V.2. Division of expenses and attitudes to price

The Spanish who have taken at least one trip a year spend on average €1,458 on their holidays. The proportional division of this holiday budget in the sample is as follows: 27.9% between €500 and €1,000; 18.7%, between €1,000 and €1,500; 13.7%, between €1,500 and €2,000; 11.4 %, from € 2,000 to €3,000; and 11.2%, over €3,000.

Almost 60% of 18 to 30 year-olds, the youngest age group, are in line with the lowest holiday budget, up to €1,000; the 31 to 43 and 44 to 56 age groups, with the lowest and middle group, between €500 and €2,000; the over 57 year-olds have the highest holiday budget, over €2,000, since they have more time to go away on holiday (Table nº 6).

When Spanish travellers are consulted directly on the price-quality relationship: if a greater percentage indicated before that they would be willing to pay more for quality, and evaluated highly price quality adjustment, now they state implicitly that many quality attributes are difficult to distinguish and turn them into price.

Therefore, the price-quality relationship, which prior to the low-cost phenomenon had appeared clear, has now become blurred to the point of having no standards with which to establish a common comparison framework. The low-cost phenomenon has shattered the traditional paradigm whereby higher price always meant greater quality.

In this survey, those interviewed tended, in their majority, to no longer perceive price as the definitive sign of quality. When asked about the price-quality relationship, while the absolute majority (93%) indicated in 2007, before the crisis, that high price did not always mean greater quality, now they are more specific: slightly more than 50% state that higher price only sometimes means greater quality, as opposed to almost 20% who state that this is usually the case. There has been, therefore, an increase in those people who associate price with the value that products and destinations offer them at all times (Table nº 7).

With respect to analysing features or motivations that influence travel decisions to a particular destination, the Spanish allow themselves to be influenced by a series of sources and channels. The most noteworthy influences on the rise since 2007 are that the product or destination has offers, and that it is fashionable. These have risen from 3.7 to 4.3 and from 1.9 to 2.4 respectively, and the impact of low-cost airlines on the general demand for low prices has been confirmed, creating the low-cost phenomenon.

Having been recommended by friends or acquaintances, and being the usual destination, are neutral influences which remain almost unchanged, at around 3 and 2 points respectively. And influences that do not carry so much weight are that the destination is famous, and that it is new or unknown, both of which drop from 4 to 3.

New and famous destinations, therefore, lose importance; a frequent buyer's attitude in times of crisis. In actual fact, clients continue to travel at this moment in time, but they concentrate their trips, taking refuge in the cheapest offers, nearer to home, in well-known places, and places on the continent. They take no risks, neither to famous nor new destinations (Table nº 8).

The same happens when the sample survey group is asked about the most important attributes or factors when booking a particular tourism product: in the first place, a good price before good service. It is clear in 2009 that the Spanish opted preferably for cheap offers. When booking their trip, they take into account a series of factors, among which the following are worth noting, in this order: quality service adjusted to price paid; quality service in itself; service provided pleasantly; and cheap service. As can be seen, the Spanish have associated decision-making to proposals in which price is extremely important; quality adjusted to price paid, and cheap service are among the first three factors affecting decision-making.

This trend has been observed since well before the economic crisis, increasing among European travellers since 2005 when the low-cost phenomenon began to spread. The desire for expensive tourism products and destinations only motivates a small percentage of the population, and is not considered so important as in previous surveys (Table nº 9).

If Spanish travellers are asked the following question: is it possible to find a cheaper price for a trip by searching through other channels, taking advantage of other circumstances, or replacing it with a substitute? 37.8% respond that this usually happens; and for almost half of the survey group (49.6%), only occasionally. The cheapest channels are the following: low-cost websites (3.55 out of 5); online travel agencies (3.40). And, to a lesser degree, product and company websites (3.36); travel agencies (2.99), central booking offices (2.52); and the tourist establishments themselves, and the telephone (Table nº 10)

The group that always finds a cheaper price among different channels is growing. The proliferation of new intermediaries in the tourism market has created greater offer capacity and, consequently, greater price competition. Thus, during the period analysed, an increase was noted in the group who answered affirmatively that "in most cases it was possible for them to find a cheaper price".

The majority of Spanish travellers interviewed have established a nexus between the holiday trip and the cheap attribute and price, without paying attention to other collateral aspects. However, this does not mean that, apart from this nexus where the majority can be found, there are certain groups who let themselves be influenced.

Thus, we can see in a market as heterogeneous as the tourism market, the influence exerted by the price variable is not the same for all tourists (Nicolau, 2008). We are faced with a dichotomy: approximately one third of the survey group has settled for price as its central influence, while another important number of those interviewed settle for quality, exclusivity, brand, etc. As a result of this data, we can deduce that three tendencies towards *price* exist.

In the face of the low-cost wave, accelerated by the economic crisis, which is reflected in 2009 when Spanish travellers are asked about their willingness to pay more if the product or destination offers some value and brand, the reaction of our survey group is frankly quite positive, very similar to the pre-crisis survey in 2007:

- If tourism products were customised (35.7%)
- If they were environmentally-friendly (20.1%)
- If they were exclusive (17.7%)
- If they belonged to a prestige brand (7.5%).

Although the attributes of exclusivity and prestige brand of an establishment or destination drop in comparison to the thriving scenario in 2007, both remain at 17.7 % and 7.5% of the population respectively. This indicates that there are groups who continue to demand brands and appreciate exclusivity.

However, the interest in the environment is striking. 20.1% state that they are willing to pay more if the offer respects the environment, an unmistakable sign that they would approve of any price increase as a result. Attitudes to climate change have undergone a maturing process, so that responsible tourism purchase behaviour has clearly emerged (Table nº 11).

On the other hand, whatever the type of holiday, the Spanish use different time periods to carry out their purchase: for summer holidays, one to three months in advance; for Christmas holidays, fifteen to twenty days; for Easter, about twenty days; and for sporadic trips, they leave it more to chance and take only a few days to decide.

With respect to payment methods, the most used are cash and payment by credit card (scoring 3.7 and 3.8 out of 5, respectively), increasing slightly compared to previous surveys.

VI.3. Information sources, buying channels and price

If we examine the influence of the different channels when choosing a particular destination or tourism product, it becomes clear that both traditional channels and new technologies are used. The most influential channels in tourism decision-making are the following in this order: friends and acquaintances, before all the others, scoring nearly 3.5 out of 5**;** guidebooks, 3 out of 5**;** tourist destination websites, travel agencies, and the media, over 2.7 and online agencies and company websites, below 2.5

Friends and guidebooks have remained practically unchanged as a result of the great reliability of the person and reference; destination websites have burst onto the scene with great force; and travel agencies and the media continue to lose importance (Table nº 12)

The most influential channels for travel information search are indeed the most used. Friends and acquaintances, guidebooks and destination websites stand out more for their frequency of use: a great deal more than travel agencies and online travel agencies. The media, company websites, blogs and the telephone have less user frequency than the previous ones. (Table nº 13)

If in 2007 we witnessed the breakthrough of the Internet as the focus of consumer decision-making, two years later, even with the crisis, we can confirm that the Spanish have internalised online consulting and have grown accustomed to its everyday use. It was then seen with anticipation; now it can be confirmed that the vast majority are Internet-users and can use the technological channels in more or less proportion.

Regarding websites, when searching for information to prepare a trip, 28% declare that they always consult them; 35%, usually do so; and 10%, only sometimes. Few of the survey group reject the use of websites; only around 10% state that they hardly ever or never use them.

Web 2.0 is used less. It is even rejected slightly (almost 25%, added to those who claim they hardly ever use it, comes to 45%). These are the levels of use: 15% state they use Web 2.0. 25% state that they only use it occasionally.

However, in the survey, the fact that the Spanish are becoming familiar with the use of certain tools related to Web 2.0 begins to emerge, such as: tools that evaluate and recommend products or destinations that users have already tried, as is the case of Trip Advisor, which obtains 2.5 out of 5; surfing social networks, searching for information and reaffirming the trust placed in the chosen option; and the use of links, from tourism news suppliers, such as iGoogle or Netvibes, Wikis, Video blogs or podcasts.

When making a booking, the greatest level of safety and payment is obtained through the travel agency (3.7), and the online agency (2.9), practically on a par with company websites and the phone. As can be seen, despite huge advances in online commerce, travel agencies remain the safest channel.

In the same way, once en route, travellers adopt very similar attitudes to when they initially search for information. The role of the guidebook simply gives the best results at this moment in time, acquiring much greater relevance as a source of inspiration for activities and tours.

Once the holiday is over, the Spanish share their experiences and memories by means of videos, photos, etc. through the following channels: friends and acquaintances (51.2%), blogs, Wikis, podcasts, Video blogs, etc. (13.8%), destination websites, directories, online newspapers (7.0 %), traditional travel agencies (6.1%) and online travel agencies (5.1%) (Table nº 14.

Finally, it is worth adding that the Spanish mainly associate domestic travel with traditional travel agencies (22.0%), with online agencies (19.4%) and with company websites (10.3%).

Middle distance travel is related above all to: traditional travel agencies (26.9%), online travel agencies (22.2%), interaction with friends and acquaintances (10.7%), and directly to company and product websites (10.2%).

The survey group perceives long distance travel as associated preferably with traditional travel agencies (32.2%); to a lesser degree with online travel agencies (21.9%), with company and product websites (10.1%), and with interaction with friends and acquaintances (9.5%).

As can be seen, Spanish tourists continue to regard the travel agency as the most suitable channel for booking trips in general, and above all, for payment security, even though online travel agencies are gaining a growing share.

Although to a lesser degree, company, product and destination websites already exceed 10% for all distances. What is striking is the capacity of the Spanish in the survey group to find friends or acquaintances to help them manage their holiday travels (Table nº 15)

VI. CONCLUSIONS

Regarding the survey results, several tendencies can be seen that are directly related to the economic crisis, and to citizens' reduced spending power. The results clearly indicate that Spanish travellers are interested in cheap offers on the Internet and a good price over and above good service, brand, etc. Greater customer sensitivity to product price makes Spanish tourists more receptive to discounts, offers, and extra services included.

Not only has the current crisis provoked a drop in travel and tourism and a cut in spending per person and day in their destination, but it also seems to have changed consumer attitudes. And, in this respect, new demands are emerging; with greater flexibility, more last-minute, and more competitive prices.

When opting for the purchase of a particular tourism product or destination, price is the most valued factor. The proliferation of channels increases this perception, which establishes price as the determining factor in buyer's decision-making. The majority of customers have found their main source of information on the Internet, although Internet is presented as the most noteworthy source of travel information. The net offers itself as an open area to all kinds of travel information, which more than half of the survey group claim to have consulted when planning a trip. However, it is not the only source of information, but it has become the buying channel par excellence.

Price has become the basic element, the basic value, and at this point, data reveals the existence of highly price-sensitive tourists, who try to bring down the price of their summer holidays in many ways: by reducing the number of overnight stays; by staying in lower category hotels to what they were accustomed; by spending less once at the destination (restaurants, shopping, etc); or by looking for more nearby destinations with less transport costs. Tourists, uncertain because of their own economic situation, want package holidays with fewer overnight stays, prices adjusted to tighter budgets, and more open dates. The crisis has intensified the *value for money* effect. The huge, emerging competition accentuates price sensitivity and the practice of waiting until the last minute to search for offers, or sort out unforeseen uncertainties.

On the other hand, most people are not willing to pay more than what they do already, which would indicate that, on the one hand, customers have established a travel price criteria (related to the least expensive), and on the other, a general budget which is a reference framework for every consumer action. However, depending on the moment, the aim of the trip, and other characteristics, the traveller will adopt price as a determining factor, or will make his/her decision on the basis of quality, brand, etc.

Thus, while the majority of the Spanish demand offers at a good price, cheap, and never exceeding their pre-established budget (focusing on price as the main element in decision-making:

- 35.7%are willing to pay more if tourism products are customised
- 20.1%, if they respect the environment
- 17.7%, if they are exclusive products
- And, 7.5%, if they belong to a prestige brand (Valls, Sureda, 2010)

These percentages of people willing to pay more if certain quality attributes are offered have been triggered by the financial crisis: they are extremely similar to those seen in the 2005-2007 period (Valls, 2007). It is clear that, alongside the general attitude towards price, exist other active *value-based pricing* combinations.

However, despite what the aforementioned duality heralds, Spanish travellers observe great confusion in the price-quality relationship, because the vast majority finds it difficult to distinguish value and quality attributes offered when faced with price, which has become the main and only category for an important sector of consumers. The perception of turbulence in the price factor has grown to such an extent that the majority state that if they search persistently, they can find a cheaper price through another channel. The consumer, therefore, does not trust the quality concept and perceives that "higher price does not equal greater quality".

Summing up, from the survey results, we can deduce a dual behaviour pattern; low-cost polarisation versus upmarket products: on the one hand, a preferential search for cheaper prices; on the other, a clear differentiation of quality, exclusivity and brands. It has been demonstrated that faced with the generalised attitude to cut travel costs, as a result of greater price sensitivity, buyer attitudes associated with quality criteria coexist in important sectors of the population (see Table 16).

Although these results may imply a certain contradictory logic, they are, from our point of view, somehow in tune with generalised trends and habits in today's consumer societies. Changes in price sensitivity, which have been provisionally confirmed in the travel sector, can be extrapolated to hotels, car rentals, shows, sports centres, etc., and no end of products on offer on the net, and they affect the economy in general. Many of these changes are common to those experienced by consumers with any product, and to a large degree, are the result of changes that Western societies are undergoing as a result of their own evolution.

We should add that the conclusion we draw from all this data is that low-cost companies have made an impact on greater sensitivity to cheap prices, and although travellers value quality, exclusivity and prestige brands, there is a strong tendency towards low prices and the ability to find them if you look; to the extent that the vast majority are willing to change the pre-selected product or destination for another less expensive one.

Under this premise, we need to analyse the available information on tourist profiles and tourist behaviour patterns in relation to expenditure in order to prioritise those product strategies, means of transport, marketing channels, promotion tools, etc., which enable us to segment and attract tourist profiles with greater multiplying effects for destinations.

The conclusions we have drawn from this study can be offered as a preview of what is happening not only in tourism and leisure, but also in the majority of economic sectors in Europe.

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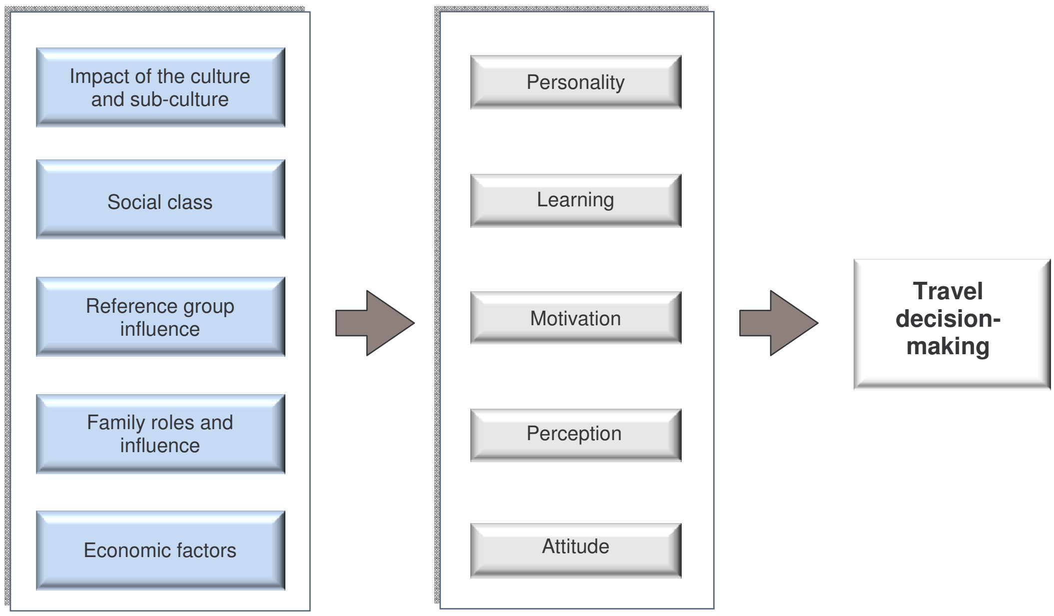
APPENDIX

Table 1. Stages in the tourism experience

Pre-purchase and purchase decision	1. Need or desire recognition 2. Search for alternatives and information 3. Evaluation of alternatives
During the holiday	4. Purchase and consumer decision
Post-holiday experience	5. Post-holiday evaluation

Bigné, Font & Andreu (2000: 222)

Table 2. Main factors affecting tourist behaviour



Source: Moutinho (1987: 6)

Table 3. Buyers according to value/price

SACRIFICE TO PRICE	Low VALUE DIFFERENTIATION	High VALUE DIFFERENTIATION
High	PRICE-BASED BUYERS	VALUE BUYER
Low	CONVENIENCE BUYERS	ASSOCIATION BUYERS

Source: De Jaime Eslava (2007: 118)

Table 4. Number of trips taken the previous year

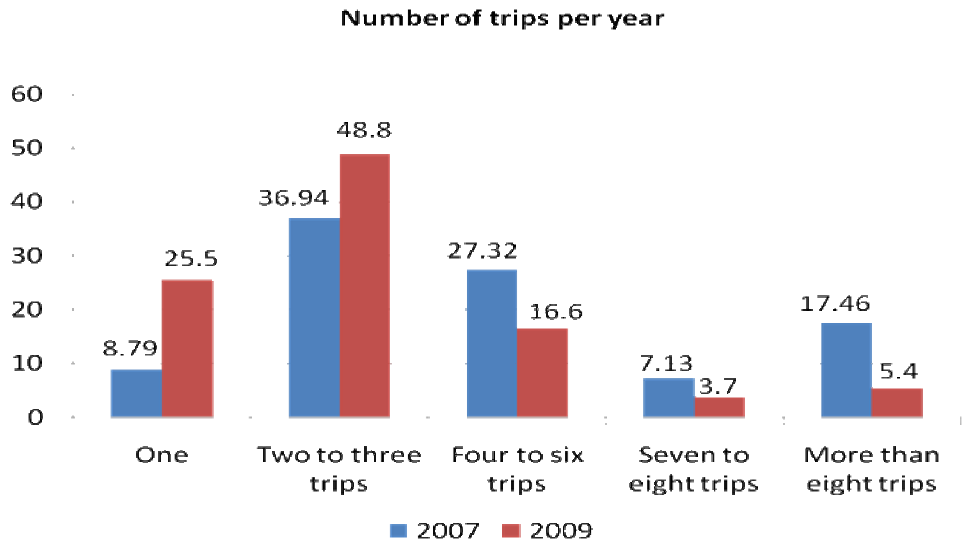


Table 5. Time (in days) spent on holidays away

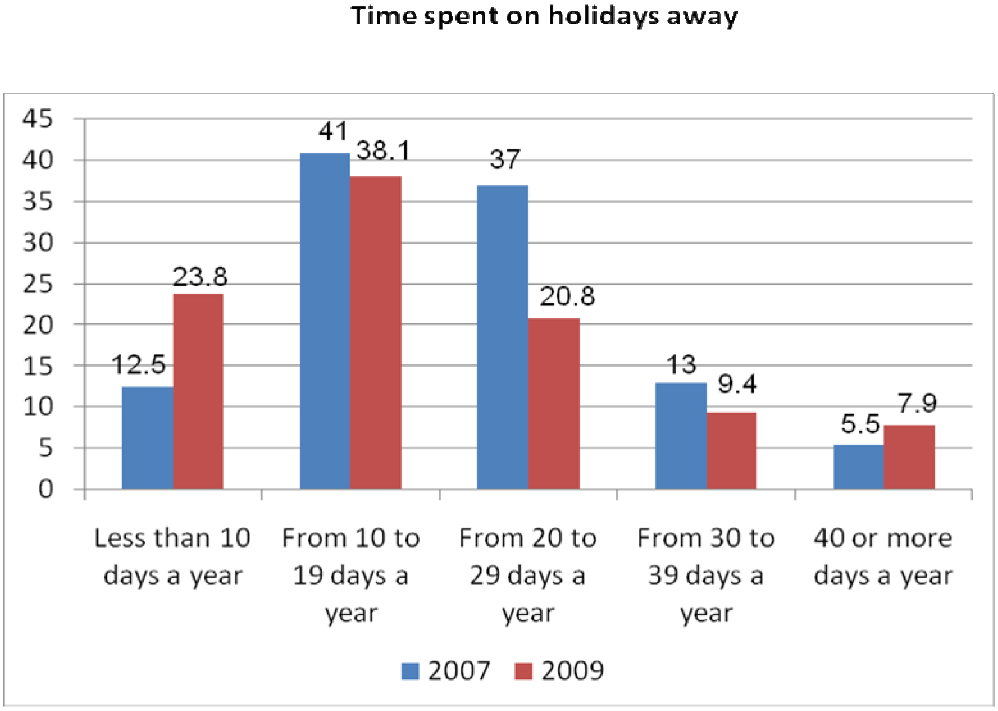


Table 6. Spanish tourism budget for the year 2009 according to age

	18 to 30 years old	31 to 43 years old	44 to 56 years old	Over 57 years old	Total
Less than €500	27.9%	17.4%	13.1%	8.9%	17.1%
From €501 to €1000 EUR	30.2%	27.4%	28.6%	25.0%	27.9%
From €1001 to €1500	18.2%	19.7%	16.6%	20.5%	18.7%
From €1501 to €2000	10.9%	14.7%	14.7%	14.7%	13.7%
From €2001 to €3000	5.0%	11.6%	14.7%	14.7%	11.4%
Over €3000	7.8%	9.3%	12.4%	16.1%	11.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

Table 7. Higher price and greater quality

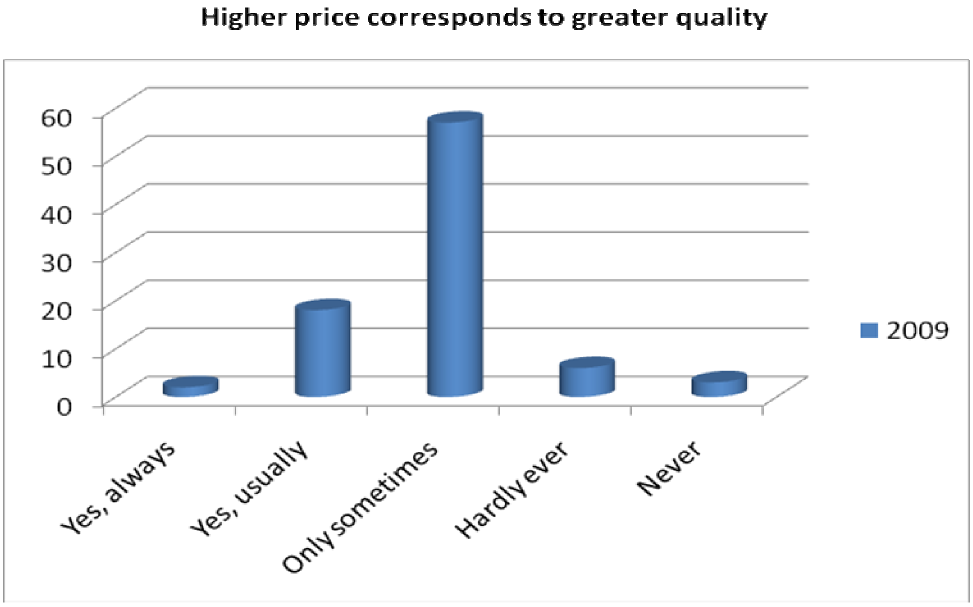


Table 8. Characteristics that affect tourist destination decision-making

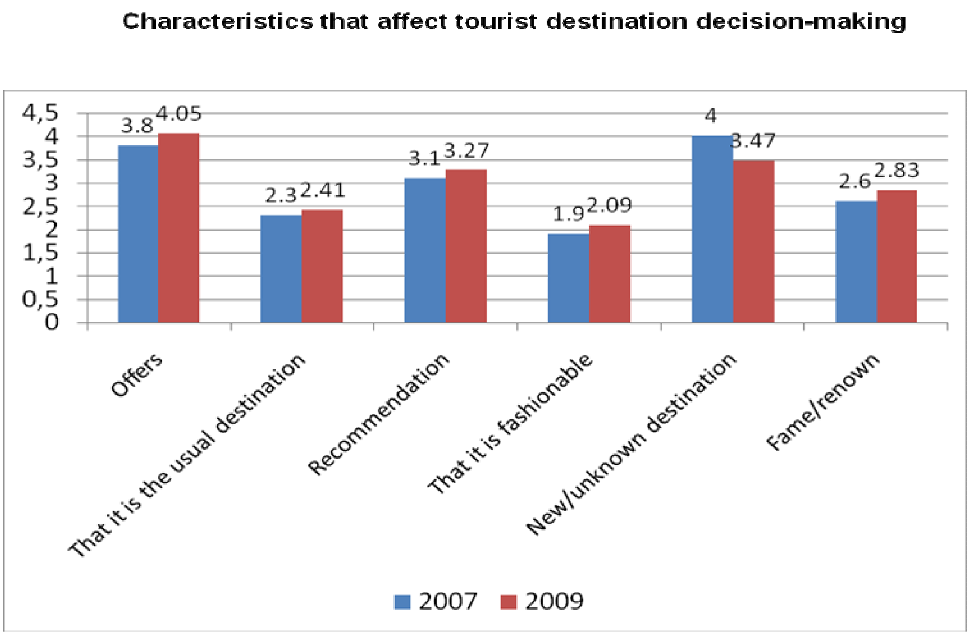


Table 9. Importance factors when booking a tourism product

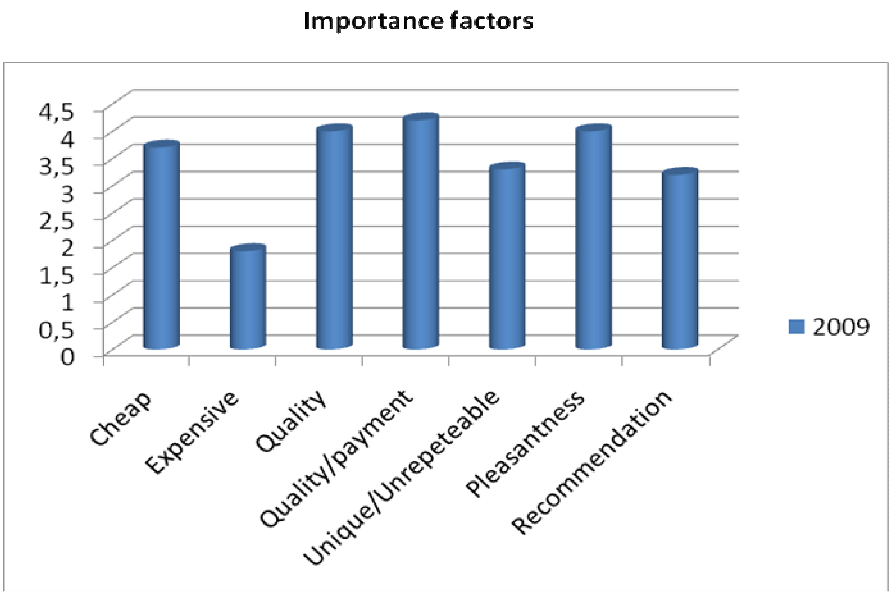


Table 10. Which are the cheapest channels?

Which are the cheapest channels?

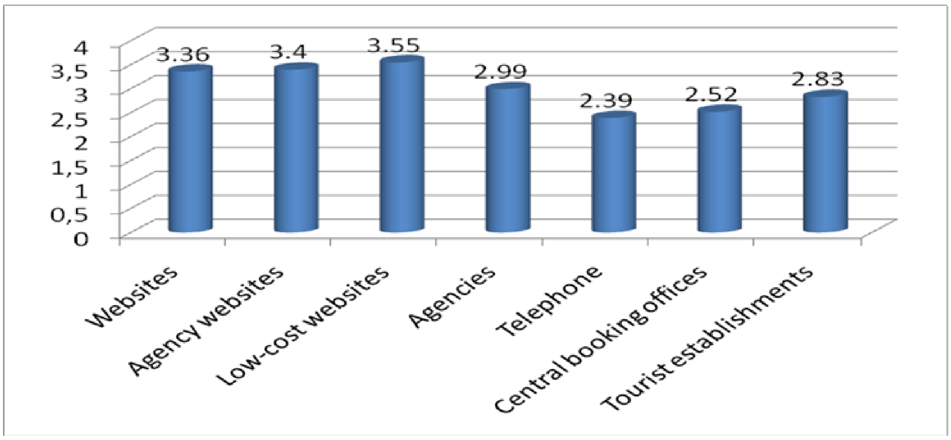


Table 11. Willingness to pay more

	Answers
If tourist products were customised	35.7%
If tourist products were exclusive	17.7%
If products belonged to a prestige brand	7.5%
If they respected the environment	20.1%
None of the above	19.1%
Total	100.0%

Table 12. Influence of channels on choice

Influence of channels on choice

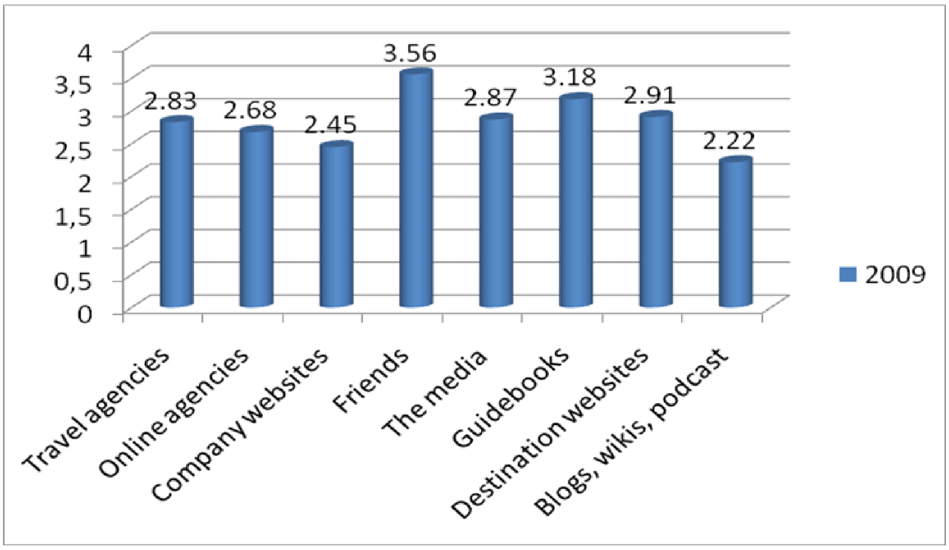


Table 13. Information search frequency/systems through channels

Frequency of search for information about travel destination

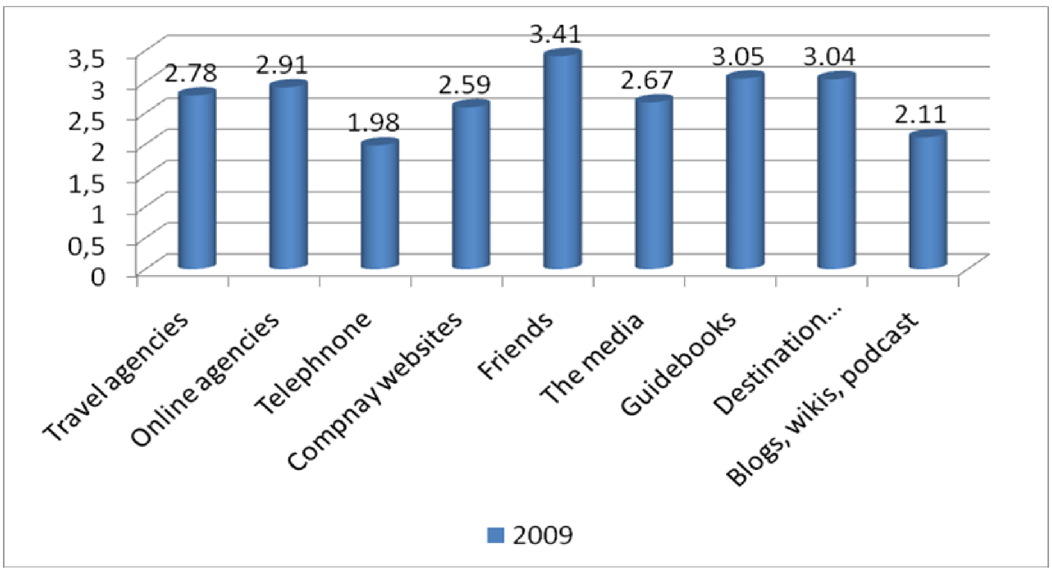


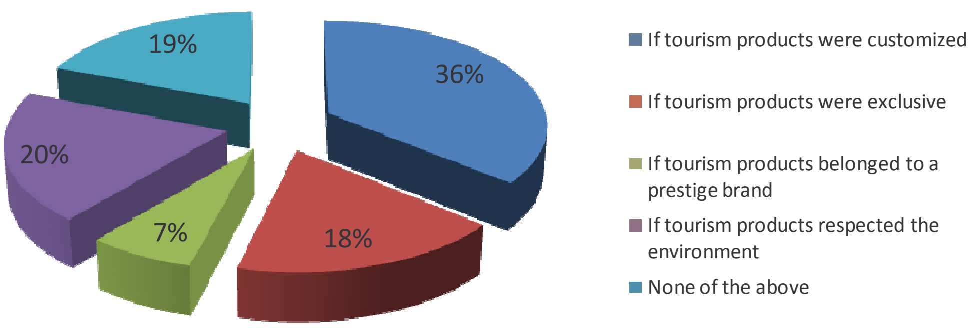
Table 14. Where post-holiday experiences are shared

	Answers
In traditional travel agencies	6.1%
In online travel agencies	5.1%
In company and product websites	3.8%
With friends and acquaintances	51.2%
In the media	2.2%
In guidebooks and travel books	3.9%
In online destination directories, online newspapers, etc.	7.0%
In blogs, wikis, podcasts, video blogs	13.8%
None of the above	6.9%
Total	100.0%

Table 15. Short-, middle-, and long-distance travel and channel

Channel/trip	Short distance	Middle distance	Long distance
Traditional travel agencies	22%	26.9%	32.2%
Online travel agencies	19.4%	22.2%	21.9%
Telephone	7.9%	5.8%	5.4%
Company and product websites	10.3%	10.2%	10.1%
Interaction with friends and acquaintances	14.5%	10.7%	9.5%
The media	3.1%	3.1%	3.6%
Guidebooks and travel books	10.6%	8.6%	7.3%
Online destination directories, online newspapers, etc.	9.2%	9.7%	7.2%
Blog, wikis, podcasts, video blogs, etc.	2.7%	2.6%	2.4%
Others	0.2%	0.2%	0.4%
	100.0%	100.0%	100.0%

Table 16. Hybrid consumption



Source: ESADE-Bancotel-2010