

## **A Websites Analysis of European Tourism Organizations**

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### **Abstract**

Internet has proved to be a widespread medium and an integral part of the habits of millions of users. An effective online communication strategy is considered nowadays a key element to achieve a competitive advantage on the market, to satisfy actual and potential tourists' information needs in a highly competitive way and to acquire new clients. All the European countries have implemented some kind of official tourism portal to promote their own destinations. An analysis of these tourism websites has been performed collecting end-user evaluations and mapping contents and services offered online. The results of this survey are presented and are compared with the general behaviour of the European Internet users regarding the usage of the network as a tool to gather information and to acquire travel services.

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### **Introduction**

Internet has become, in hardly more than thirty years, the most significant development in communications since the invention of the printing press and has revolutionised deeply the way in which we communicate. The number of users connecting to the Internet worldwide is estimated in more than 600 million and it is still growing (NUA 2002). Moreover, it has been the fastest growing communications medium ever and the great part of this diffusion is due to the development of the World Wide Web; its rate of diffusion has been much faster than radio in the 20's, television in the 50's and mobile phones in the 80's (Odlyzko 2000). For these

characteristics the Web has been defined, since the beginning of its mass diffusion, the *Holy Grail of marketing* (Foxworthy 1997). Its actual potential as a marketing tool is then greatly enhanced when fully integrated with other functionalities of the Internet, such as e-mail or public discussion boards, supporting real-time *one-to-one* and *one-to-many* communications.

Internet provides features that are especially relevant to the marketing of tourism. Travel is an experiential practice; travellers are not simply buying packages, stays, seats, or food and beverages, they are fulfilling fantasies (Archdale 1995). The Internet, with its wealth of information, pictures and multimedia has the capability to provide the appropriate stimuli to favour the purchase of a travel product or service. Recent demographic (Cyberatlas 2002) data show that the top 15 tourism-spending countries (WTO 2001) also exhibit (with the exception of China) the highest percentages of Internet users among the population (Table 1).

Rank	Country	Internet users (% of population)
1	United States	59.10
2	Germany	38.91
3	United Kingdom	57.24
4	Japan	44.10
5	France	28.39
6	Italy	33.37
7	China	3.58
8	Netherlands	60.83
9	Canada	52.79
10	Belgium/Luxembourg	36.62
11	Austria	45.20
12	Republic of Korea	53.80
13	Sweden	67.81
14	Switzerland	52.70
15	Taiwan	51.85

Table 1 Top tourism spending countries and Internet users data for the year 2002

Furthermore, it is well-known that the tourism subjects are at the first places in the interests of world's cybernauts: just to give an example almost 47% of European Internet users browse the Web while planning a trip and almost 23% of them actually buy tourist products online (ETC 2002). This wide utilization of the Internet for travel related purposes is confirmed by the revenues of e-commerce in this area. In Europe, online travel sales have risen from 4.8 billion Euro in 2001 (2.3% of the total tourism market) to 6.9 billion Euro in 2002 (3.2% of the market, a 42% increase), and the growth is give to continue with forecasts between 15 and 20 billion Euro for the year 2006 (Marcussen 2002).

As the tourism business, like many others, continues its globalization process, the competitive pressure on individual destinations and attractions increases. The growing competition, the increasing range of travel markets, products and destinations, as well as the ever more difficult chore of finding new market segments and communicating with them, makes the Internet a valuable tool for marketing travel and tourism (Pollock 1995). This is particularly true for destination marketing, an activity in which the success is mainly given by the ease with which a good wealth of information about places, facilities and events is transferred to the visitor (Sheldon 1993).

## Successful Internet websites: evaluation methodology

The Internet and the Web are still too young to be thoroughly understood phenomena, but, as such, they are much studied. A great number of surveys and investigations have been performed in the last years. Many of these deal with the behaviour of a cybernaut and on the features required to attain a good level of success in the promotional and marketing activities in the cyberspace (Barwise et al. 2002). Summarizing the ideas and the studies from a number of practitioners and researchers, it is possible to compile a list of elements that are essential to the development of a successful web site. This sort of decalogue may be expressed as follows:

- Strategies, objectives and target audience must be clearly identified.
- Features that make possible an interaction between the user and the organisation must be present and designed in a usable way. Possible other features adding functionality or aesthetic appeal must be planned in a coherent way and prove functional to the site contents.
- Informational content must be presented in a readable and correct way (colours, size, fonts, grammar, style, etc.). The site must exhibit credibility, relevance and accuracy of the information presented in order to encourage the users to explore further and to return regularly to the site.
- Rational structure supported by navigation aids must avoid any risk of confusion and allow users to browse all of the sections with great ease.
- Regular and frequent maintenance to add, revise or remove content and to correct errors and malfunctions must be accomplished.
- Promotion of the site must take place using an integrated approach that incorporates traditional media and online resources.
- Financial, human and physical resources required for the Internet marketing effort must be given the correct consideration and planned and controlled in a reasonable way.

The websites of the major European and a number of Mediterranean tourism destinations have been assessed using a methodology derived from these considerations. The assessment consists of a heuristic evaluation of the user perception of the website and a mapping of contents and services offered by the presenting organization. Both elements allow then to define a measurement of the appreciation by the visitors which can be expressed as a quality index of the website. The first step of the procedure consists in measuring the visitor opinion. Combining the principles listed above with a number of features that might characterize a successful e-tourism website, it is possible to define a list of items than can be inspected and evaluated by an appropriate sample of users of a specific website. The full list of features is divided into six main categories:

- *first impact (FI)*: the general feeling during a first scan, before an accurate visit of the site;
- *design and graphics (DG)*: the quality of graphical elements (pictures, symbols, photographs, etc.) and the balance between texts and images;
- *information contents (IC)*: the thoroughness and usefulness of information, the clarity of language;
- *interactivity and services (IS)*: the number and the quality of the interactive services and the tested user-friendliness of the functions;

- *structure and navigation (SN)*: the rationality of website structure and navigation aids;
- *technical management (TM)*: the updating of the contents, the response times and the absence of errors or missing links.

The evaluation is qualitative, the sample visitors express their appreciation of the various website usability features by means of a score (Baggio and Covini 2001; Antonioli and Baggio 2002). Evaluators have been asked to award a score from 0 (minimum) to 3 (maximum) to each item of the list. The second step in the assessment procedure is the mapping of the contents and services offered on the websites. The analysis has been accomplished by identifying a series of possible informational contents and interactive services that are considered useful or appealing for a user of a tourist website (see for example: Rachman and Buchanan 1999). The items list, comprising elements such as accurate geographical information, itinerary descriptions, interactive request forms and e-business functionalities, is structured in four main groups:

- *informational contents (IN)*: information and documentation contents,
- *customer relationship (CR)*: contents and services that make relationships with clients and visitors easier and stronger,
- *interactive services (SV)*: general interactive functions and services,
- *e-commerce (EB)*: commercial and e-business functions.

The evaluators are asked to check the existence of the items on the website under analysis and to assign a score (from 0 = min to 3 = max) taking into account the usability and the completeness of the single functionalities. The data for the complete assessment were collected in the last months of 2002. The sample evaluators group was formed by 15 people with different knowledge of the tourism sector and different backgrounds of Web navigation experience; one third (5 people) had a sound experience (more than 3 years) in web browsing, the remaining considered themselves having “low to medium skills” in the usage of Internet technologies. The group size, although small, is considered to grant sufficient reliability for this kind of assessments (Nielsen and Landauer 1993). The total sample thus consisted in 15 evaluations of all the websites listed in Table 2. Each evaluator inspected all the websites filling a questionnaire built according to the methodology explained above, containing the items for both the heuristic evaluation and the contents and services mapping. The results presented in the rest of this papers are the average scores received by each website.

<b>Country</b>	<b>URL</b>
Austria	<a href="http://www.austria-tourism.at">www.austria-tourism.at</a>
Croatia	<a href="http://www.croatia.hr">www.croatia.hr</a>
Egypt	<a href="http://www.touregypt.net">www.touregypt.net</a>
England	<a href="http://www.visitbritain.com">www.visitbritain.com</a>
France	<a href="http://www.franceguide.com">www.franceguide.com</a>
Germany	<a href="http://www.germany-tourism.de">www.germany-tourism.de</a>
Greece	<a href="http://www.gnto.gr">www.gnto.gr</a>
Italy	<a href="http://www.enit.it">www.enit.it</a>
Morocco	<a href="http://www.tourism-in-morocco.com">www.tourism-in-morocco.com</a>
Portugal	<a href="http://www.portugal.org">www.portugal.org</a>
Scandinavia	<a href="http://www.goscandinavia.com">www.goscandinavia.com</a>
Slovenia	<a href="http://www.slovenia-tourism.si">www.slovenia-tourism.si</a>

Spain	www.tourspain.es
Switzerland	www.switzerlandtourism.ch
Tunisia	www.tourismtunisia.com
Turkey	www.turizm.gov.tr

Table 2 Websites analysed

The sample comprises the official tourism websites of the European countries as a number of websites belonging to Mediterranean countries that have a strong influence on international tourism. More than that, most of these countries, mainly the North African ones, have in the last years increased their market share (tourist arrivals) more than the “traditional” European destinations (WTO 2002), have improved the overall quality of their tourism infrastructures and present themselves as strong rivals for many European destinations.

The development of information and communication technologies, the ever increasing diffusion of the Web as medium have, in the last few years, contributed greatly to a globalization process that can be thought of having, as main effect, “the compression of the world and the intensification of consciousness of the world as a whole” (Robertson 1992: 8). Thus geographical and spatial differences among destinations shrink in the perception of a tourist. The whole euro-mediterranean area can be considered as a single tourist “meta-destination”, the main attractor in the world (WTO 2002), in which the different countries face an increasing competition.

## European tourism websites analysis results

The results of general average evaluations for the websites listed in Table 2 are shown in Figure 1. On the scale used (0 to 3) the 1.5 mark means an average sufficiency verdict. As can be seen clearly, only few websites reach this score. Looking at the distribution of the evaluations in the different groups (Figure 2) it can be noticed that the highest scores are generally achieved by what may be called *aesthetic features*: first impact (FI), design and graphics (DG), both strongly related, and structure and navigation (SN). Information contents (IC) are not considered sufficient for both the quantity and the quality of information provided. Some evaluators noticed to have had the feeling to be exposed more to advertisements than to really useful information about many of the locations presented on the websites. In many cases even basic data such as driving directions or addresses and telephone numbers were “well hidden” in the texts. Interactive services (IS) have been considered absolutely not sufficient for their scarcity and, in many cases, for their poor usability or for the unreasonable amount of data required to perform apparently simple operations. Typical example is the request of a full set of personal data (names, addresses, telephone numbers, various kind of preferences) to gain access to a newsletter subscription, while an email address is thought to be the only element needed.

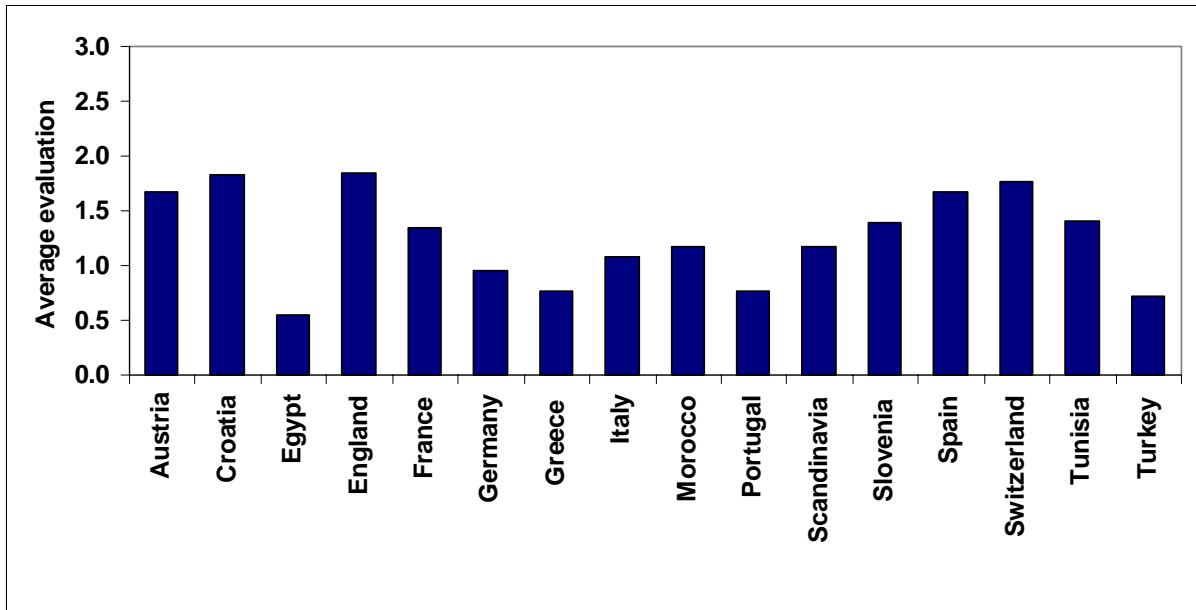


Figure 1 General average evaluation

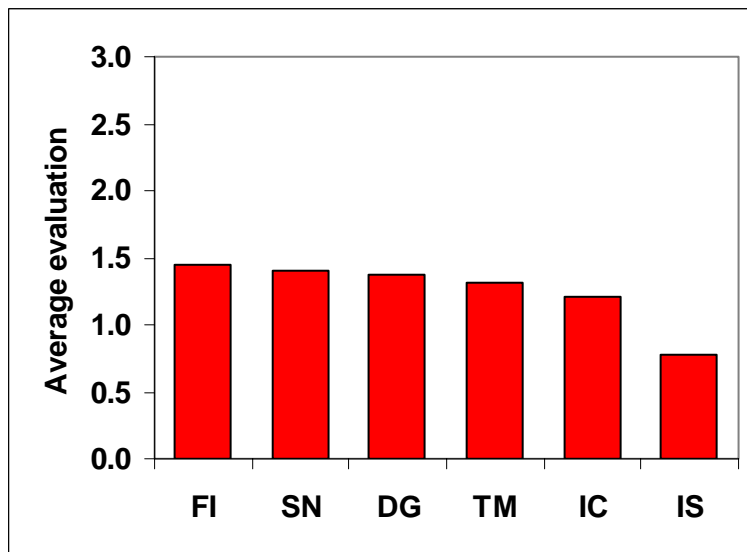


Figure 2 Average evaluations for the features groups

The main consideration that arises from these results is that, in general, fascinating graphic effects are preferred to useful and usable information about the destinations. Surprisingly, Internet, with all its multimedia potential and the huge possibility to store materials, seems to be still much under-exploited: besides that, interactive functions, such as the opportunity to arrange customised itineraries or to have real-time quotations and confirmations, are still very few. The approach is still dominated by a strong dependency on “traditional” advertising concepts rather than on a clear understanding of the habits and the preferences of Internet cybernauts.

A confirmation of this fact comes from the analysis of the contents and services offered online by the websites studied. Figure 3 gives the percentage of features (contents and services) present in the websites with respect to the general list of items discussed in the previous paragraph. With only few exceptions, most of them offer less than 50% of the

contents expected. Put in different words, it appears that the fast evolution of information and communication technological media has not been followed so far by a resolute change in the production and the distribution of tourist products. The usage of the Web, as far as national destination management organizations are concerned, is still in an infancy stage for most of them.

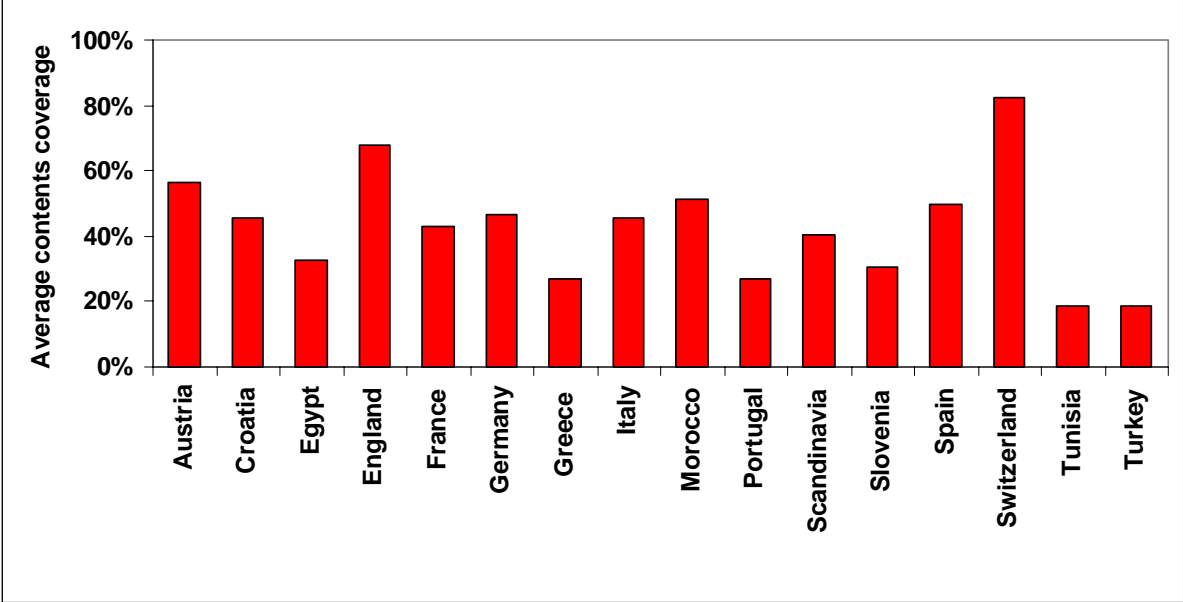


Figure 3 Average contents coverage

Averaging the results (Figure 4) attained by the items groups, it can be seen a sufficient presence of informational documentation features expected (67%) but a very low incidence of interactive services (47%) an even lower occurrence of customer relationship features (40%) and an almost non-existent (17%) set of functionalities able to develop an e-business environment with other public or private partners. This state may lead to a paradoxical situation in which the visitor may be offered a good set of informational contents and convinced to “adopt” the destination and be frustrated by not finding an adequate level of interactive services to interact with the organization, to make a reservation or to pay for the booking, thus reverting to a different one.

Again, this confirms the previous perception of an “advertising” rather than “interactive service” attitude of the main national tourism organizations towards the customers, actual or potential. The communication model still prevalent is the traditional one-way mass communication model and little has been done to realize the importance of a personalized and direct contact with the customers and to implement real possibilities to achieve this objective. From a certain point of view it looks like a new TV channel has been opened instead of a new effective bidirectional communication channel.

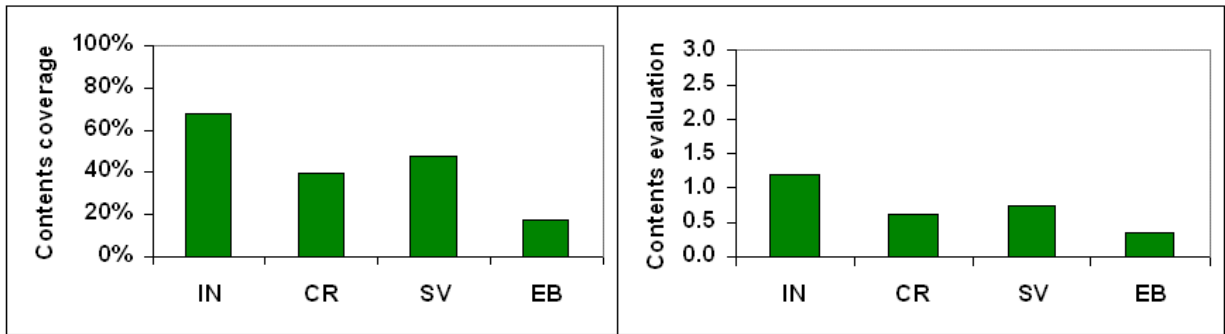


Figure 4 Average contents offered online by European tourism websites

Defining quality and a metric to measure quality for a website can greatly increase the possibility to compare different implementations and, for a single organization, may offer a tool to assess the acceptance of own product by the users. In essence a website is a software application and the ISO 9126 general quality definition for software products may be used. It defines quality as: “the totality of features and characteristics of a software product that bear on its ability to satisfy stated or implied needs”. More generally, for a tourist website we may think of a quality model as a set of criteria used to determine if it reaches certain levels of favourable reception of the contents by a visitor. The criteria used so far to perform the evaluations may be combined to define a general quality index:

$$\text{QUALITY INDEX} = \text{AVERAGE EVALUATION} \times \text{CONTENTS COVERAGE}$$

where AVERAGE EVALUATION is the average score obtained in the user evaluation process and CONTENTS COVERAGE is the percentage of features (contents and services) present in the websites with respect to the complete list.

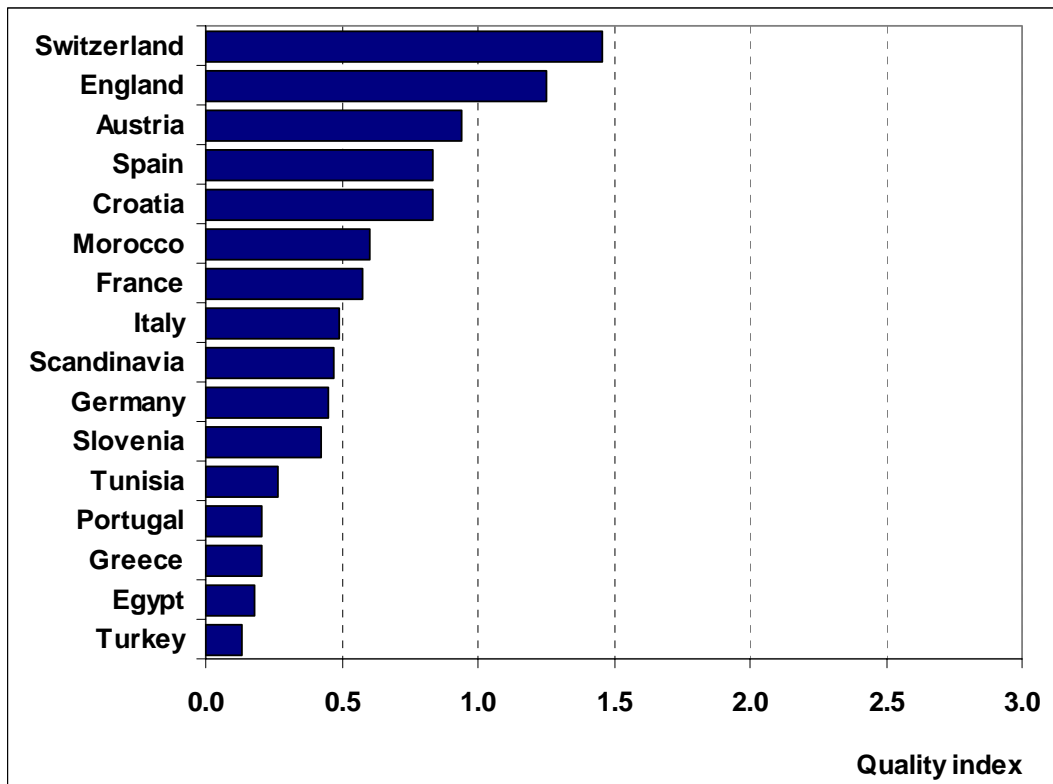


Figure 5 European tourism websites quality index



The quality indexes calculated for the websites under analysis are depicted in Figure 5. Only one website almost reaches the sufficiency (Switzerland) while the great majority (9 out of 15) exhibit a very poor result (less than 0.5). It is interesting to notice that some of the best known tourist destinations in the World like France, Italy and Germany attain a result that looks incompatible with their reputation. Evidently the ever growing importance of the Internet communication channel and the potentiality of its usage in tourism has not yet been fully realized.

**Website quality impact on tourism**

Influence of website quality on brand building and loyalty has been assessed in a number of empirical and theoretical works (Holland and Menzel Baker 2001; Barwise et al. 2002; Ilfeld and Winer 2002), and many stress the critical role of the first impression created by a website as well as its ease of use (Smith 2000). A website is one of the primary faces of an organization towards its customers, suppliers, employees, and partners and it can be a powerful tool for brand awareness, product information, commerce and customer service. These considerations should have been well understood by the national tourism organizations.

Figure 6 maps the rank as international tourist destination (WTO 2002) and the Quality Index of the national tourism websites. With an ever-growing proportion<sup>1</sup> of Internet users seeking tourist information on the Net, high-rank destinations with “bad” websites face the risk of loosing valuable customers such as those from the wealthy origins that are also intensive Internet users (see Table 1). For a destination marketing organization, the low users evaluation and the relative poverty in terms of contents and services may have serious effects on the development of the whole destination and may generate a general distrust that can eventually affect also the economic performance of the “real world” (see, for example, Gaudin 2002).

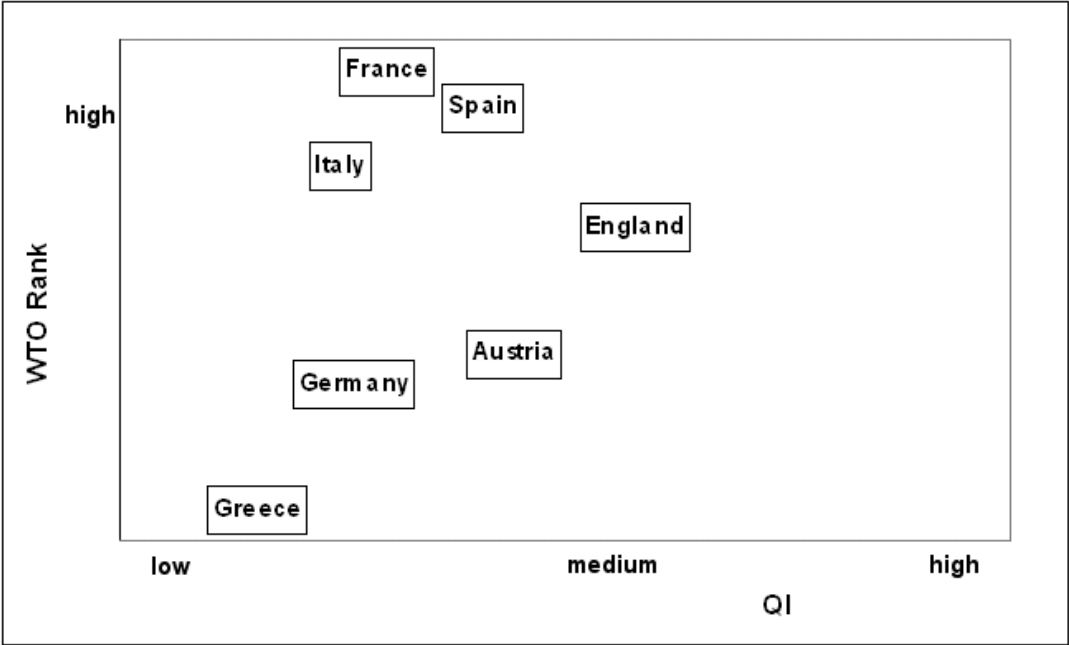


Figure 6 Website Quality Index and rank as tourist destination

<sup>1</sup> For example, a survey by Yesawich, Pepperdine & Brown/Yankelovich Partners (Carton 2002) shows that 90% of Americans who have access to the Internet search information on tourism web sites and almost 66% prefer a website to a travel agents.

The online market for travels and packages has been growing in the last years at a very high speed, but with different pace in the European countries. A survey by the European Travel Commission (ETC 2002) gives the proportion of users that look for tourism information on the Internet and the proportion of users that actually buy a tourist product online. The ratio buyers/lookers is a good indicator of the effectiveness of the online tourism implementations and of the growth potential of this important market. The ratio reflects the percent of site visitors (lookers) who become buyers (bookers). These ratios, along with the previously calculate quality indexes, are shown in Table 3 and Figure 7.

	QI	Buyers/Lookers
Switzerland	1.45	0.44
England	1.25	0.84
Austria	0.94	0.31
Spain	0.84	0.26
France	0.58	0.69
Italy	0.49	0.08
Scandinavia	0.47	0.26
Germany	0.45	0.39

Table 3 Buyers/lookers ratio and Quality Indexes

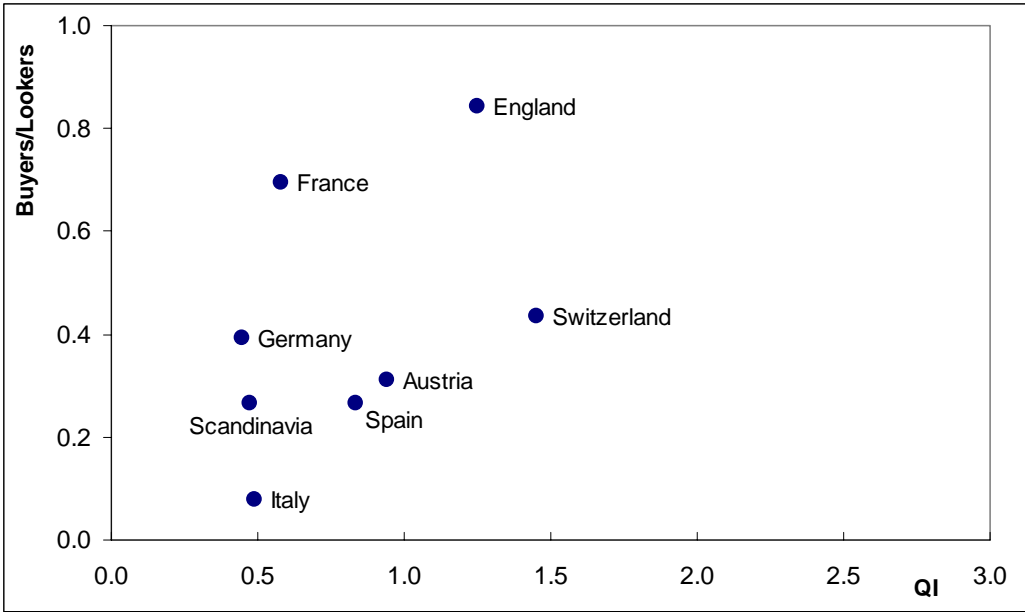


Figure 7 Buyers/lookers ratio and Quality Indexes

Even if it is not possible to maintain that there is a strict relationship between the two variables (a linear regression gives a  $R^2 \approx 0.2$ , which cannot be considered statistically significant), it is rather clear that a positive correlation exists. This fact leads to the consideration that, give the huge amount of money involved in the ecommerce activities, countries showing poor quality may be losing commercial opportunities for local companies. As a matter of facts, the intrinsic nature of the Web, with its absence of “geographical” boundaries, makes possible the fact that similar products (travels, packages etc.) for a specific destination may be sold online by a company belonging to a different country. This is what happens, for example, in the case of well-known virtual travel agencies such as Expedia ([www.expedia.com](http://www.expedia.com)) or Travelocity ([www.travelocity.com](http://www.travelocity.com)).

## Conclusions

European countries are the most popular tourist destination in the world and the promotion of their resources is a crucial activity, mainly performed by the various national tourism organizations. Internet and the Web have proved, in the last years, to be a widespread communication and business environment and have rapidly become important part of the habits of millions of users. An effective online communication strategy is considered nowadays a key element to achieve a competitive advantage on the market, to satisfy actual and potential tourists' information needs in a highly competitive way and to acquire new clients. All the European countries have implemented some kind of official Internet tourism portal to promote their own destinations.

An analysis of these tourism websites has been performed collecting end-user evaluations and mapping contents and services offered online. The results of this survey show that, even considering the relative young age of these implementations, the websites presently fail to keep most of the promises. While the potential of the Internet has been much showed off, most of the websites do not meet their potential. Users evaluations and mapping of contents and services offered attain a generally low quality index, mainly in the area of the customer relationship functionalities. Organizations may be handing over to close competitors' significant parts of their market share because their websites deliver a poor quality of experience to their users. Moreover, given the relationship between online buyers and website quality, some of the countries do not take full advantage of the ecommerce capabilities of the Internet thus risking to lose significant business for the companies involved.

In performing the analysis a quality index has been defined by combining user evaluations and level of contents and services provided. Obviously, no claim of "absolute" validity of such a measurement can be made. The attempt to quantify quality characteristics may prove useful in comparing different implementations and, more, if the assessment is performed at regular intervals during the life of a website, such an index can help designers in better meet user needs and preferences easing the way to achieve a good success. While it may be difficult to be able to design a "good quality" website at its first publication online, a regular evaluation of target users acceptance of the implementation provided should become common practice in order to derive the elements needed to review, modify or update the contents, services and the graphical aspects of a tourism destination website. On the other hand, the comparison of the online presence provided by different subjects is a good way to assess own position among the competitors.

The main limitations of studies like the present one on the evaluations of a website is the lack of common and generally accepted assessment principles. Many different research works propose different although similar approaches (see for example many of the papers in Frew 2004). A more uniform methodology could prove extremely valuable in comparing the evaluations performed by different groups in different conditions thus increasing the usefulness of the approach and of the indications that can be derived by such works.

The website of a tourism destination can give a competitive advantage especially towards the main tourism spender countries, where the Internet technologies have nowadays reached a real mass diffusion. The implications of a methodology to assess the quality of a website as perceived by the casual user are very important. Even though theories about design and implementation techniques of usable software products exist, it is without doubt that the success of a website is guided by the appreciation of the users and their criteria are the most important determinants.

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