Italian Tourism on the Internet: the Province of Rimini

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1. Italian tourism on the Internet

The Tourism sector, more than many others, is going through a series of deep transformations mainly due to the globalisation process and the changed conditions of an increasingly dynamic international competition. These elements involve all the steps of tourism production, but the introduction of new technologies in communication and information management is particularly relevant.

An effective e-commerce strategy is considered nowadays a key element to achieve a competitive advantage on the market. The integration of the Internet distribution channel with traditional ones allows to satisfy customers' information needs in a highly competitive way and to acquire new clients.

In Italy, the demographics and the usage patterns of the Internet are in general agreement with that of the rest of the world, but the e-commerce penetration is at a much lower level than in other countries. This situation is especially true in the online tourism field, where the proportion of online transactions is much lower compared to that of other countries.

Some part of the difference can be explained with the gap in general e-commerce development and with the historical concerns on mail order sales. But these reasons are, obviously, not sufficient.

Empirical surveys give a confirmation of the fact that one of the main grounds of the poor commercial performance of the Italian tourist sites is the relative low quality of the implementations in terms of contents and services offered (Antonioli and Baggio, 2002a, 2002b).

Figure 1 shows the distribution (in terms of percentage of sites which contains that particular type of content) of the main kinds of website contents: customer relationship services (CUST.REL), e-commerce functionalities (ECOMM), informational materials (INFO) and general interactive services (SERV).
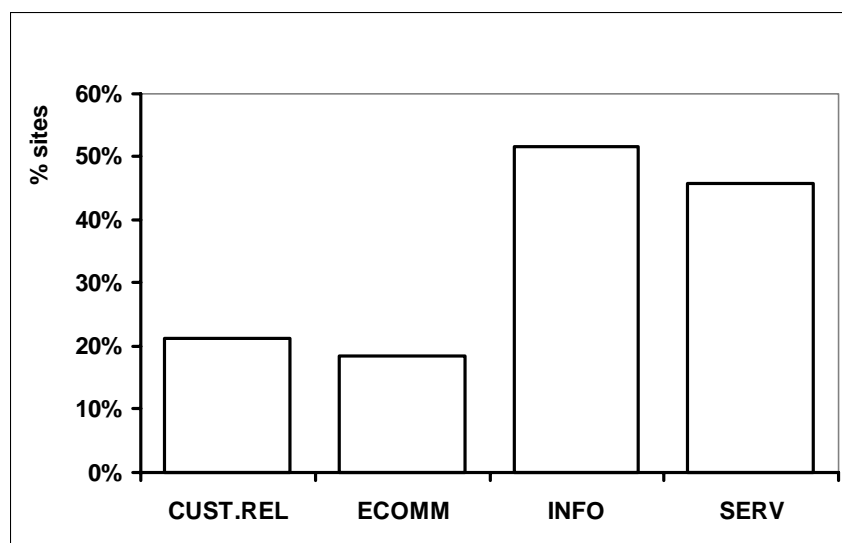

Figure 1 - Contents and services of Italian tourism websites

The user evaluations (given on a scale from 0 to 10) of the main characteristics of Italian tourist websites are shown in Figure 2. The total average value is 6.58, a hardly sufficient grade.

A general ranking, on the base of the average score, shows Public Sector websites (*Pub.Sector*) at the first place, followed by hotels and, in general, by suppliers. Last come the commercial intermediaries (tour operators and travel agencies).
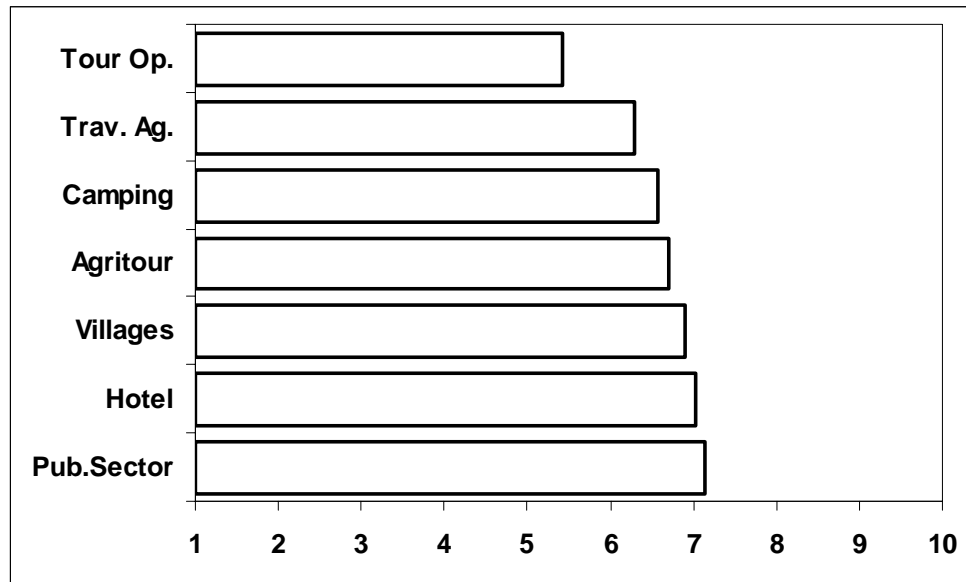

Figure 2 - Italian tourism websites evaluations

This general low quality poses a great risk of disintermediation for the intermediaries (tour operators and travel agencies). Not finding valid web sites offered by traditional intermediaries, the user is more tempted to turn to the main providers (hotels, airline companies, etc.) to fulfil his vacation needs. The disintermediation effects and the fear to disturb the traditional distribution channels are the main motivations that hold back the development of online products able to offer the contents and the services the users would like to have.

For other tourism operators, the relative poverty in contents and services creates a general distrust that can eventually influence also the "real world" economic performance (see, for example, Gaudin, 2002).

Present forecasts on the near future technology developments show two main areas in which many efforts are concentrated: *m-commerce* and *recommendation systems*. In both cases the requirement of high quality and well usable implementations is of vital importance to attain a fair economic performance.

2. The Province of Rimini

The Province of Rimini, and its Tourism Department, can be taken as a good example, although unfortunately one of the few, of a coherent and effective planning of the institutional promotion by using in a comprehensive way the available technologies and media.
The province territory covers the southern part of the Emilia-Romagna coast in the central eastern part of Italy.
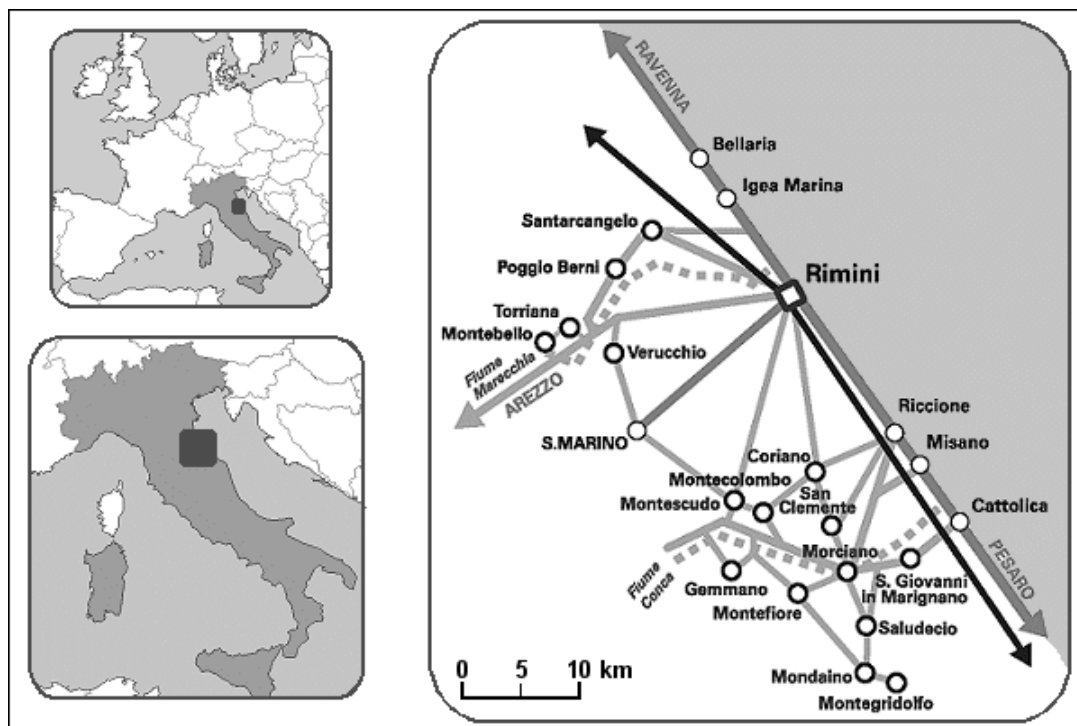
Figure 3 Province of Rimini geographical location

Ever since the first sea-bathing establishment was opened in 1843, the Province of Rimini has proved an important place for holidaymakers in search of relaxing days at the sea, or fun and games in one of the theme parks, and equally suited for lovers of night-life and for visitors interested in the art treasures of the past, like the historic centres of the hinterland. Moreover, conference and business tourism can take advantage of a very modern exhibition centre and of numerous structures for events and conferences.

Known all over the world for its hospitality, the overall tourist capacity in the province runs to more than 140,000 beds in almost 3,000[1] structures concentrated mainly on the coastline. In the space of a year the Rimini district counts more than 2.5 million arrivals, mainly from Italy (80%) and European countries (see Table 1). The province is one of the main contributor to the almost 45 million arrivals that pose Italy at the fourth place among the top world destinations (WTO data).

Year	Arrivals	Overnight stays
1999	2,487,427	14,861,024
2000	2,661,665	15,823,936
2001	2,704,023	16,044,480
2002	2,675,710	15,698,609

Table 1 Tourist statistics for the Province of Rimini

2.1. Tourists profile

A series of surveys conducted[2] between 1996 and 1998 identified the typical visitor coming to Rimini as a tourist:

- not fully mature and not fully aware in buying a touristic product;

[1] 90% of these structures are hotels. In recent years there has been a strong growth of other accommodation types: camping sites, farm holiday centres, hostels, etc.
[2] the surveys were conducted mainly by Eurisko, a well known Italian social and marketing research company through *Sinottica*, a regular psychographic survey on socio-cultural trends and behaviour of Italians.

- with limited education and strong dependency from the social signals;
- with good spending capabilities.

This target group, evaluated in almost 8 millions people (Italians) showed, however, a clear tendency to evolve towards higher cultural levels, strongly increasing its critical capabilities. The situation is shown in Figure 4, where the main Emilia Romagna (the Rimini region) present positioning and possible evolution is compared with other Italian regions.
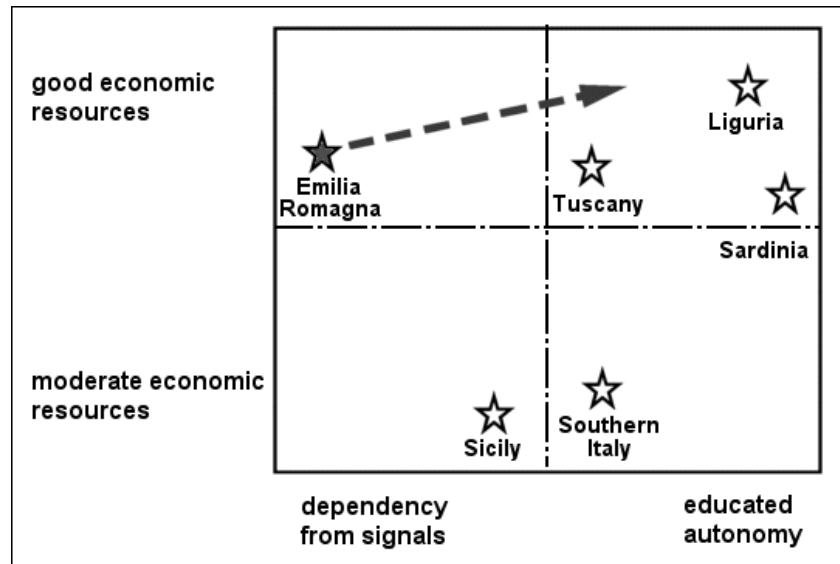

Figure 4 Psychographic segmentation of Italian tourist destinations and evolution foreseen for Emilia Romagna

With these results, the local administration started a repositioning program mainly based, for the first phase, on communication and promotional activities.

The general idea was to "*reshape and harmonize the physical and virtual access ports*"[3] to the district. Recognizing the important role that the advanced communication technologies could have in the future, a great emphasis is put on the planning and redesigning of the Rimini utilization of information and communication technologies, with the objective to integrate fully the ICT's in the day-to-day activities.

The main lines of the project are:
- build a new and coherent brand image of the whole province;
- reshape the physical interfaces with the tourists;
- create new products better suited to the evolving tourist profile.

2.2. Province of Rimini brand image

The overall appearance of all the promotional materials used on the tourism market has been redesigned by using the methodologies distinctive of a private company corporate image project.

The objective is to move from the stereotypical pictures of sea, beach, families and kids to an image able to stress the reception abilities, the professionalism of the operators and the hospitality traditions with a modern and captivating layout.

The new graphical style applied to a number of different objects is shown in Figure 5.

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[3] The expression is due to Massimo Gottifredi, Councillor responsible for Tourism and Hospitality of the Province of Rimini.

Figure 5 The new corporate image applied to a number of objects: guides, shoppers, CD-Rom packages, etc.

With the same objectives, at the end of 2001, an international contest was launched for a project to redesign the Tourist Information Offices. The winner project (by CooProgetto, a group of Italian architects of Faenza) is depicted in Figure 6.
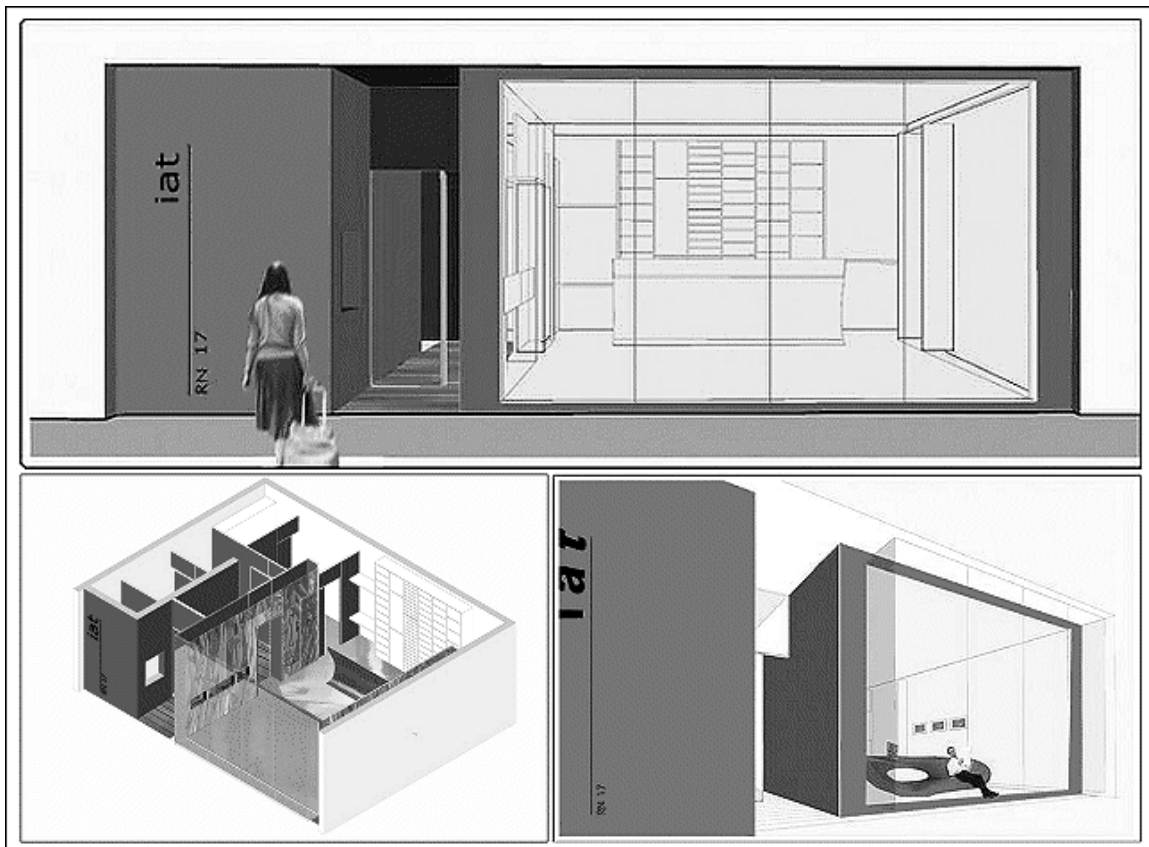

Figure 6 The new project for the Tourist Information Offices

Elements characterizing the project are the innovative approach to the usage of the space and the ways of interacting with tourists that are given a central and active role in searching for information. This role is enhanced by easing the self-consultation of the sources with an extensive use of multimedial and interactive archives, allowing a non-stop access to the information points.

During 2003 the first two (of 18 offices) will be restyled with the new layout.

2.3. The Malatesta Seignory

The *Malatesta Seignory* project has been developed to deseasonalize the tourist offering and to make the province hinterland autonomous from the seaside.

The project started at the beginning of 2000 and makes provision of a separate communication and promotion line, with specific brand, logo and graphical image.

Figure 7 The Malatesta Seignory logo

A network of local operators (mainly the 15 municipalities of the area) has been formed and a set of promotional materials has been prepared comprising a dedicated guide and a series of educational tours for the specialized journalists.

This territory, the heart of the ancient of the Malatesta, one of the most powerful Italian families which ruled Rimini from XII to XVI century, is being promoted emphasizing different features with respect to the Riviera. Characteristics like the historical and cultural heritage, the gastronomy and the typical products, the natural resources and a relaxed lifestyle are the main focus of the promotional activities. The target group for this product is tourists with good disposable income, high education and attention to holidays details that make them independent from mass communication signals.

Central point of the Malatesta project is the new website (www.signoriadeimalatesta.it) designed to reinforce the promotional objectives and to give an always up-to-date reference database to the tourists.

Figure 8 The Malatesta Seignory website home page

2.4. Rimini on the web

The new website (www.turismo.provincia.rimini.it) of the Tourism Department the Province of Rimini has been restyled at the beginning of 2002.

The Internet presence is considered essential to give a clear sign of a modern and innovative administration, able to satisfy the complex and high expectations of the contemporary tourists. Besides that, the website is now the centre of the global tourist documentation and reference system and a powerful tool to establish a direct communication channel between tourists (actual or potential) and the destination management organization.

Two main lines have guided the website restyling:

- a thorough analysis of target users to ensure a useful and usable reference system;
- a design of an integrated database system able to back the informational needs of all the websites implemented (the main site and the Malatesta Seignory website).

Figure 9 The Province of Rimini website home page

The graphical interface, obviously, is fully coherent with the general image designed for the Rimini district. The website counts the following sections:

- *news*: with the last news on the province and the website;
- *identity card*: with the basic reference information (maps, addresses, useful data, etc.);
- *for operators*: section dedicated to the local tourist operators;
- *press office*: information and documentation for the journalists;
- *your holidays*: the main area with the information for the visitors (hospitality, sport, recreation, culture, events);
- *let's talk about …*: articles and commentaries on the territory, the culture, the events;
- *links*: a selection of other websites useful for the tourists;
- *help*: the sitemap and the instructions for the site's functions.

Online since February 2002, the website has continuously grown in terms of users. Having tested the good acceptance of the implementation (the site has recently been nominated among the best 100 Italian webs by the Italian Web Award Committee), in the next future the project will be further developed with:

- full translation into different languages (english and german at first);
- implementation of community functionalities like thematic discussion forums and newsletters for the different possible users of the site;
- new possibilities to gather regular information or updates by using automated messaging systems (via email, sms, fax, etc.).

One more important extension, then, will be the cooperation with the main local Hotels Association to provide users with online booking facilities and an electronic smart card to access services and resources.

2.5. Lessons learned

The Province of Rimini is the first public destination management organization in Italy to adopt a clear, coherent and complete communication plan in which both traditional and new technological media are taken into account with equal importance and are given equal consideration.

It is too early to be able to have measurable results from the activities performed in the framework of the new communication plan. In a year like 2002, characterized by a sensible reduction of the tourist movements, a decrease of about 2% in the main season (Table 2) may be considered a good result, rewarding the choices made.

Month	Arrivals		Overnight stays	
	2001	2002	2001	2002
June	503,127	484,244	3,148,561	3,032,882
July	505,711	485,599	4,017,759	3,935,378
August	622,708	629,426	4,625,024	4,526,548
Total	1 631 546	1 599 269	11 791 344	11 494 808
% Difference	-1.98%		-2.51%	

Table 2 Tourist statistics for the main summer season

Measurable results are those coming from the usage statistics of the Rimini Tourism Department website (Table 3).

	Hits	Pages viewed	Visitors	Pages/visitor
Feb	78,284	18,097	956	19
Mar	353,210	87,162	5,338	16
Apr	471,892	98,687	8,472	12
May	677,596	147,219	13,105	11
Jun	963,195	202,049	17,137	12
Jul	1,334,394	299,226	21,560	14
Aug	861,926	172,506	16,280	11
Sep	322,422	76,270	8,000	10
Oct	263,515	67,644	7,343	9
Nov	265,695	50,613	7,954	6
Dec	286,954	62,067	7,949	8
Total	5,879,083	1,281,540	114,094	

Table 3 Website statistics for the year 2002

The results attained give a clear evidence of the good acceptance of the website implementation.

A comparison of the tourist arrivals data with the website visitors, is shown in Figure 10. As can be seen, the two distributions have a similar trend with a shift of about one month.
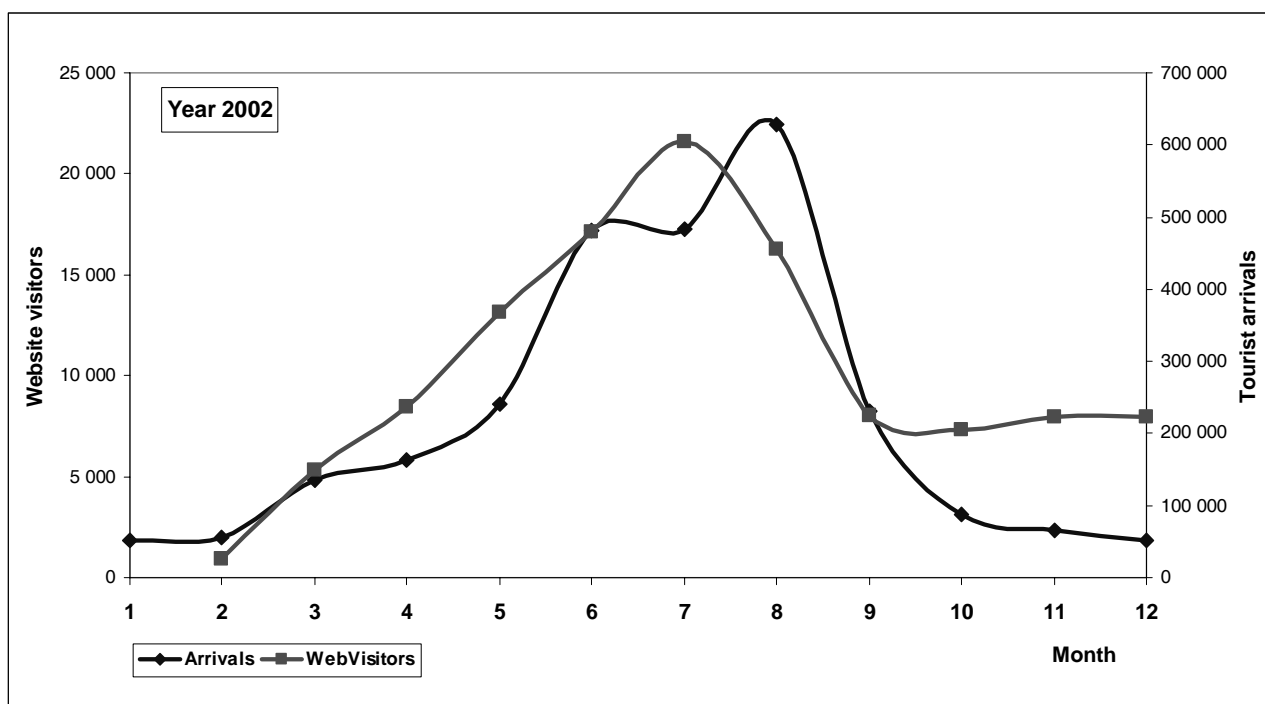
Figure 10 Website visitors and tourist arrivals during 2002

This fact may be interpreted as a good appreciation by travellers that consult the website sometime before their trip to the district and gather information and documentation on the resources of the area. This is further confirmed by looking at the ratio: *pages viewed / visitor* (Table 3) which remains rather constant and at a good level throughout the year.

3. References

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