

## “Webbing”, how to increase incoming tourism using the power of the Web

By Giuseppe Giaccardi, Lidia Marongiu and Andrea Zironi<sup>1</sup>

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### 1. Webbing, how the idea has come into being

From some time, it is quite hard to find someone who works in tourism and has never heard anything of Web 2.0 or social networks. Many operators and institutions have experienced social media to enhance online marketing and promotion strategies. How are they doing it? Which resources are they using? And what kind of results are they achieving? The curiosity to understand if it would be possible to find a successful “formula” to emulate has led us to think of a research that analyses tools and strategies conducted by institutions and operators and detects a valid “modus operandi”, which could be repeated in other contexts. We have thought of a research able not only to map the different typologies of 2.0 activities and instruments adopted, but also to analyse and transfer how institutions and enterprises can build a *web of relationships* in order to compete on the market. In this way, *Webbing* has come into being.

### 2. Webbing, how tourism can be developed building a *web of relationships*

For some time, the Web has already been the primary work infrastructure in tourism economy. At the beginning it was the primary work infrastructure in business to business relations (involving tour operators and travel agencies), and over time it has become a communication platform and then a relation platform with the

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<sup>1</sup> Giuseppe Giaccardi, Lidia Marongiu and Andrea Zironi are senior partners of Studio Giaccardi & Associati – Consulenti di Direzione, located in Ravenna (Emilia-Romagna) and in Sassari (Sardinia). Since 1999, the consulting studio produces economic and enterprise strategies through its own independent economic research activity and the development of new competences on the Web. On the Webbing research, which has been carried out by Unioncamere Emilia-Romagna, has collaborated also the junior partner and analyst, Stefania Deiana, the person in charge for the international interviews. On the previous editions of the Regional Tourism Observatory, Giaccardi, Marongiu and Zironi have published the articles “Tecniche anticicliche di crescita del business delle PMI turistiche: esperienza e risultati del progetto Fattore K” (Report 2008, pp. 329-354) and “Il turismo fluviale nell’area del Po: un’opportunità per i territori” (Report 2009, pp. 277-301). For downloading and information, please see [www.giaccardiassociati.it](http://www.giaccardiassociati.it).

final consumer.

More than in other sectors, the *prosumer*<sup>2</sup> plays a key role in the buying decision process.

The prosumer tourist uses the Web before, during and after his travel. He goes online to compare prices and read opinions, reviews and travel tales. He makes online his travel arrangements. During the holiday, he leaves comments on social networks, seeks information and books other services. Once he gets home, he writes reviews, posts photos and comments on social networks and, in such cases, writes about his experience on blogs and forums.

In this way, his holiday is at the disposal of the online community: usable, useful and able to influence the travel choices of those people who leave far away but share similar interests. Tourism institutions and firms can choose to be there, in this palimpsest made of images, words and conversations. They can invest in it by creating occasions for talking and listening to customers. They can take the choice to build a “*web of decisive relationships*” for their business.

The value of listening to customers has not been discovered by social media and does not belong only to revolutionary marketing theories of the last century. But it is the successful driver of relations, in tourism and in other sectors, on - and off - line.

The goal of Webbing is to understand how institutions and tourism businesses are working to build their *web of relationships* on the Internet and improve the local economic development.

### 3. Who needs Webbing? What is Webbing for?: the project and the research methodology

The project goal was to select and study experiences and good practices in tourism connected to the new “frontier” of social networking in order to understand how make the growth in tourism incoming possible using the Web.

All the activities were carried out from July to October 2010. Here is the specific methodology adopted:

- Distinction between *info-commerce*<sup>3</sup> and *e-commerce*<sup>4</sup> activities
- Distinction of the *mission* of the public and private websites
- Definition of the selection criteria of tourism websites: 16 European and 4 national public web portals, 14 European and 6 national private websites
- Focus on regional scale web portals for the public subjects and tourism SMEs’ (working in the accommodation sector) websites for the private subjects
- Definition of the criteria to analyse what kind of content the selected subjects make usable on the Web. In-depth analysis of
  - o information architecture
  - o technology
  - o content
  - o branding, relations and business policies.
- Definition of the distinct interview checklists for the persons responsible for the public web portals and the private websites.
- 2 benchmarking actions
  - o Action1: analysis of the official tourism web portals of 20 European travel destinations and interviews to the persons responsible for them.
  - o Action 2: analysis of the private tourism websites of 20 accommodation businesses and interviews to the persons responsible for them.

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<sup>2</sup> A prosumer is the consumer who has the ability to produce content.

<sup>3</sup> Info-commerce is the activity of assuming information before the buying of goods and services on the Internet.

<sup>4</sup> E-commerce is the buying and selling of goods and services on the Internet.

- Data entry, data and image classification and elaboration, research report and final synthesis.

As preliminary activity to the benchmarking study, a wide desk analysis of the website communication models has been carried out.

Action 1 has included:

- Comparison among 7 items and 70 benchmarking indicators
- In – depth analysis of the interaction strategies and the Web 2.0 activities of the selected cases of success
- Analysis of 12 online booking systems
- Phone interviews to the related persons in charge
- Interview reports
- *Info-commerce* and *e-commerce* activity study
- Creation of a ranking system (the Webbing Rank) in order to identify the best practices to emulate

Action 2 has included:

- Comparison among 5 items and 14 benchmarking indicators
- Phone interviews to the related persons in charge
- *info-commerce* and *e-commerce* activities study

The research results have produced precious cultural, technical and strategic information able to represent an important instrument of knowledge, considering the relevant role of Web marketing in tourism. Webbing would like to be considered as an experimental project dedicated to the scientific monitoring of European tourism “best practices” on the Web.

**4. Web 2.0: how 20 European travel destinations use it**

These are the travel destinations involved in the first action of the project:

*Table 1- The 20 official tourism web portals*

Land	Region	Website
Italy	Tuscany	<a href="http://www.turismo.intoscana.it">www.turismo.intoscana.it</a>
	Trentino	<a href="http://www.visittrentino.it">www.visittrentino.it</a>
	Veneto	<a href="http://www.veneto.to">www.veneto.to</a>
	Ligury	<a href="http://www.turismoinliguria.it">www.turismoinliguria.it</a>
Austria	Carinthia	<a href="http://www.carinzia.at">www.carinzia.at</a>
Croazia	Central Dalmatia	<a href="http://www.dalmatia.hr">www.dalmatia.hr</a>
France	PACA	<a href="http://www.decouverte-paca.fr">www.decouverte-paca.fr</a>
	Normandy	<a href="http://www.normandie-tourisme.fr">www.normandie-tourisme.fr</a>
	Brittany	<a href="http://www.tourismebretagne.com">www.tourismebretagne.com</a>
Germany	North Rhine - Westphalia (NRW)	<a href="http://www.nrw-tourismus.de">www.nrw-tourismus.de</a>
Portugal	Algarve	<a href="http://www.visitalgarve.pt">www.visitalgarve.pt</a>
Spain	Catalonia	<a href="http://www.gencat.cat/turistex_nou/">www.gencat.cat/turistex_nou/</a>
	Valencia	<a href="http://www.comunitatvalenciana.es">www.comunitatvalenciana.es</a>
	Andalucia	<a href="http://www.andalucia.org">www.andalucia.org</a>
UK	Cornwall	<a href="http://www.visitcornwall.com">www.visitcornwall.com</a>
	South-East England	<a href="http://www.visitsoutheastengland.com">www.visitsoutheastengland.com</a>
National destinations	Denmark	<a href="http://www.visitdenmark.com">www.visitdenmark.com</a>
	Greece	<a href="http://www.gnto.gr">www.gnto.gr</a>
	Sweden	<a href="http://www.visitsweden.com">www.visitsweden.com</a>
	Switzerland	<a href="http://www.myswitzerland.com">www.myswitzerland.com</a>

Why these destinations? Because they have

- at least one official tourism promotion
- a multi - product offer
- a good number of International arrivals (at least 20%)

16 are regional destinations → the research is focused on the impact of web on regional tourism strategies

4 are National destinations → which have adopted an unitary tourism promotion strategy

#### 4.i. Institutional info-commerce strategies: some evidence

##### Logo and pay-off

- All the websites have a distinctive logo.
- 11 have also a characteristic pay-off (e.g. Veneto - *Tra la terra e il cielo*, Normandy – *à vivre pour revivre*, Switzerland - *Semplicemente naturale*)
- Only two websites use testimonials (Catalonia and Cornwall).

Graph 1 – Logos and pay off of the 20 selected websites



##### Who deals with the website?

10 websites are directly managed by the regional or National tourism Public Authority.

5 are managed by government-controlled companies (Trentino, Liguria, Andalusia, Cornwall and Switzerland).

5 are managed by companies owned partially by the regional or National related Authority and the private sector (Tuscany, Carinthia, North Rhine-Westphalia, South-East England, Sweden).

##### Who deals with the website content?

In 9 cases, content is managed by the same organizations that manage the website. They have an editorial office or a specific staff (Algarve, Denmark, Greece, Liguria, Normandy, NRW, South East England, Sweden, Veneto). In 2 cases (Toscana and Trentino), content is managed in cooperation with other local tourism boards/authorities.

It is very interesting the case of Spanish Regions (Catalonia, Andalusia and Comunidad Valenciana) that turn also to the private sector.

Foreign languages

On average, each web portal has been translated into 5 languages. Switzerland's website has the largest number of languages (14 included Arabian and oriental languages). Afterwards there are Carinthia, Normandy, Denmark and Sweden (11 – 12 languages). At the end of September, Catalonia launched the new "multi – website" [www.catalunya.com](http://www.catalunya.com), with a project of 18 languages!

6 web portals have been translated in up to three languages (included their own first language): Cornwall, NRW, Algarve, Greece, Tuscany and Liguria.

All the websites have been translated/written in English. The second most used language is German (16 websites use it). 7 websites have been translated in Chinese, 5 in Russian and 4 in Japanese.

In 16 cases, the website access is directly provided in the user's language.

The age of the web portals and their innovations

The two – year period 2009 – 2010 was a moment characterised by transformation on the Web for all the tourism promotion websites. 5 of them were totally updated during 2010: Catalonia, Greece, Liguria, Normandy and Veneto.

In the spotlight is the new website of Catalonia [www.catalunya.com](http://www.catalunya.com) which has replaced the previous content management system with a new "website – system" that feeds content concerning products and destinations of other 25 websites.

Andalusia updated its Web presence at the end of 2009 as well.

Graph 2 – Catalonia's website [www.catalunya.com](http://www.catalunya.com)



In general, during the last two – year period all the websites were updated or adapted their information architecture, graphics, interaction activities through social network, implementation of new tools of interaction with users, publications of interactive and geo – referenced maps, media galleries and trading area. It is to highlight the choice to continuously update the communication/promotion strategies and tools. Many websites seems to always be in BETA version, so much so they change frequently.

Information classification

All the analysed websites allow users to access to content through 4 macro – typologies of classification:

- destination/location (in some cases it is possible to refer to a *form*, through a drop – down menu, and select the destination of interest);
- tourism product;
- tourism service;
- interest and user typology

These typologies are often combined each other. In such cases, the chosen taxonomy is mostly driven by emotional reasons, rather than rational needs of usability.

Graph 3 – Typologies of peculiar information classification

The figure consists of four screenshots of tourism websites illustrating different information classification typologies:

- Tuscany:** Shows a "For you" section with personalized proposals for "Tuscany for Women", "Cycletourism", "Horseback Tourism", "Underground Tuscany", "School Tourism", and "Via Francigena: the Pilgrim Route". It also features a tool called "Interests" that allows the selection of one content or destination by indicating a preference among 6 product classes (Art and culture, Wellness, Wine, Food and shopping, Nature, Sport, Music, cinemas e entertainment).
- Carinthia:** Shows a form for content personalization based on three elements of classification: "When?" (Date of arrival and departure), "What?" (Choose your interests like Accessible, Cross country skiing, etc.), and "Where?" (Here's the place to be).
- Normandy:** Shows a section titled "Les escapades, à vivre pour revivre" with a "Choose !" filter for "Experience Normandy Far from Ordinary". It includes categories like Discover, Indulge yourself, Relax & recharge, Adventure & Adrenalin!, and Family Fun.
- Brittany:** Shows a section titled "I'm travelling with..." with personalized content for customer clusters (families with children under 5 years old, couples, etc.).

All the websites spotlight news, offers and events sections. These have a high update frequency. All the 20 websites have a database of accommodation, 10 have a database of services, 2 have one of transports. 19 out of 20 have a database of tourism destinations.

Almost all the websites belong to a system that links together other websites, which delve into specific topics: tourism products, tourist's interests or profiles, geographic areas, type of accommodation, etc. The following regions - Trentino, Veneto, Carinthia and Catalonia - have created, more than others, a system of related websites connected to the main one.

Investments and Web strategy results

The most part of analysed systems have focused on two elements of investment:

- technological adaptation/development to update or replace completely the technological platform
- adaptation of communication strategies to new 2.0 tools (*social media strategy*).

Investments have been considerable, even if it is not possible to determine an average value: it ranges from € 10 million of Tuscany for the whole Web strategy to other amounts which are less than euro 1.000.000.

Catalonia has spent euro 9 million for the new platform, Andalusia euro 5.600.000 for a three year investment on the Web, the 15% of the regional tourism promotion.

Even if some interviewees told it is early for a concrete estimate, the first results of these investments are significant:

- increasing visits to the website
- increasing brand reputation on the Web
- promotion toward new customer clusters and on new markets
- increase in off-peak travel
- increase in national and international arrivals
- more online purchases through the website.

Interviewees are certain that tourism promotion on the Web will be more and more connected to the development of 2.0 strategies, in particular through

- more presence and activity on social network: Facebook and Twitter but not only
- more interaction between social networks and websites
- new 2.0 applications and tools on the website, e.g. through the development of communities or proprietary social networks
- new applications and tools for *mobile* and *ad hoc* websites, “augmented reality” applications, promotional cards which can be used through smartphone, geo – referenced maps, etc.
- external resources for the production of content, in particular through thematic blogs

#### Interaction and Web 2.0 strategies

It is not easy to follow all the evolutions of websites towards Web 2.0. During the research period ( July – September 2010), the structures of the websites were suddenly subjected to changes and innovations and we observed a daily frequency of changes in the communication and interaction ways with users.

8 travel destinations stand out on account of their distinctive 2.0 strategy:

- Tuscany: The “Voglio Vivere così” campaign is a permanent infrastructure of International communication based on the integration of different means of communication and a strong investment on social media. A social media team formed by 13 *evangelists*<sup>5</sup> from all over the world monitors more than 40 different social media, hundreds of blogs and conversations. It analyses Tuscany “Web reputation” and builds relationships with the *influencers*<sup>6</sup> on the Web. All the social media and blog profiles are classified for thematic areas on “All things Tuscany” ([www.turismo.intoscana.it/allthingstuscany/network/](http://www.turismo.intoscana.it/allthingstuscany/network/)), the official network that works as a “collector” of content from external blogs, where it is “spoken” about Tuscany. Content collection is based on the most popular key words and topics hit by users. The social media team uses also a software to analyse all the online conversations from the semantic point of view. This monitors and values tourists and users’ perception of brand Tuscany on the qualitative level.
- Trentino → “Trentino Social Media Newsroom” ([www.social.visittrentino.it/](http://www.social.visittrentino.it/)) is the access to Visit Trentino social world, where anyone can tell his own experience, upload photos and videos, comment articles of interest, give suggestions and ask for information.
- Brittany → “Fans De Bretagne” ([www.fans-de-bretagne.com](http://www.fans-de-bretagne.com)) is the internal community that had 2.061 fans in February 2011 (476 in September 2010), 4.915 photos (they were 1.027), 430 comments (they were 302), content available in 2 languages (French and English).
- Catalonia → the community “Fans de Catalunya” ([www.fansdecatalunya.cat](http://www.fansdecatalunya.cat)) collects 12 groups for each typology “customer/tourism offer”. “Catalunya Experience” is the 2.0 tourism section of the new tourism communication system of the Region, “collector” of all the 2.0 activities.

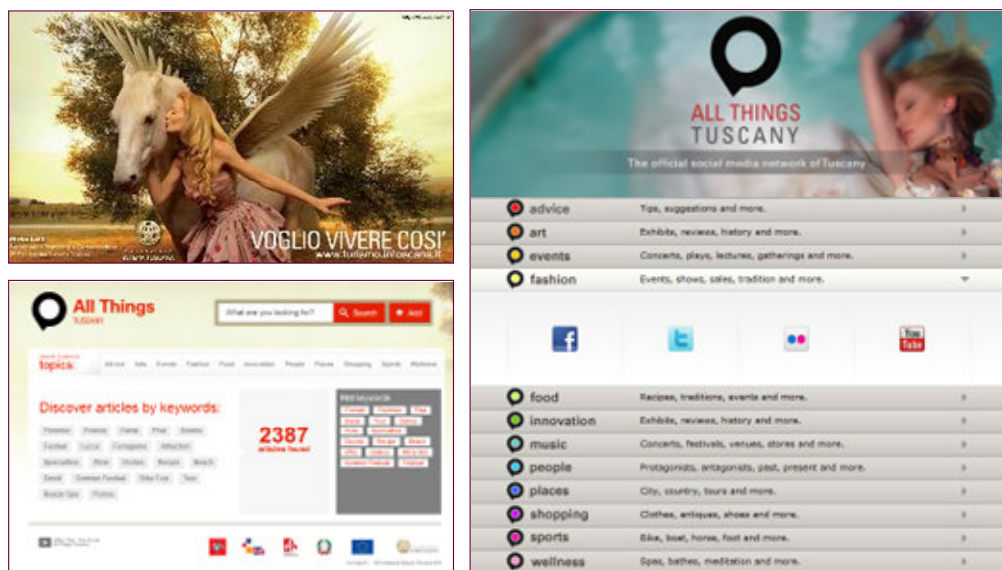
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<sup>5</sup> “Evangelists” are people who foster the diffusion of ideas and content through the social nets which enliven social networks. In the case of Tuscany, the 13 evangelists form a social media team, which monitors every day 45 social media and hundreds of blogs contributing to enliven conversations about the whole Tuscany’ s offer.

<sup>6</sup> “Influencers” are people who share knowledge with the online community in different sectors and through different instruments (blog, social network, forum) becoming for readers a reference point able to influence and orient opinions and choices.

- The Valencian Community → The “Communities 2.0” section had 30.011 members in February 2011 (28.269 in September 2010), 881 comments (591 in September 2010), 2.235 photos (472 in September 2010), 111 videos and several thematic blogs.
- Andalusia → the newborn “Community Andalusia” (<http://comunidad.andalucia.org>) appears as a new version of the official website and will soon offer a range of new interactive functions to make tourists an integral part of the project; among them, an *ad hoc* social network to organize their own travel, upload photos and see those of other users, plan a personalized itinerary and share suggestions and experience. Andalusia has also a forum ([www.andalucia.org/foro](http://www.andalucia.org/foro)) where anybody can “talk about Andalusia, meet people and share experiences”.
- Denmark → “Denmark Game” is the interactive game of Visit Denmark to discover the Country.
- Sweden → The Community website [www.communityofsweden.com](http://www.communityofsweden.com) has 1508 members and there it is possible to share photos, travel stories, suggestions by friends in Sweden and all over the world.

Graph 4 – Tuscany’s social media strategy and “All Things Tuscany” network



Graph 5 – Denmark Game - Visit Denmark



Presence on social media (data referring to the 15th July 2010)

17 websites out of 20 have opened at least an institutional profile on Facebook, 4 have more than one profile (Tuscany, Denmark, Sweden and the Valencian Community). There are totally more than 80.500 fans, on average about 2.000 for each profile. Sweden and Switzerland are the two destinations with the largest number of fans (12.000).

14 websites have a profile on Twitter, with an average number of 443 followers. NRW is the first destination with its 1.293 followers.

16 websites have a profile on YouTube with 686 uploaded videos, on average 40 for each profile, 1.536.000 views (on average 90.000 per profile). Tuscany has the largest number of videos (197) and views (861.000). 11 websites have a profile on Flickr with more than 5.000 uploaded photos (on average 430 for each profile). Tuscany is still the first with 1.749 uploaded pictures.

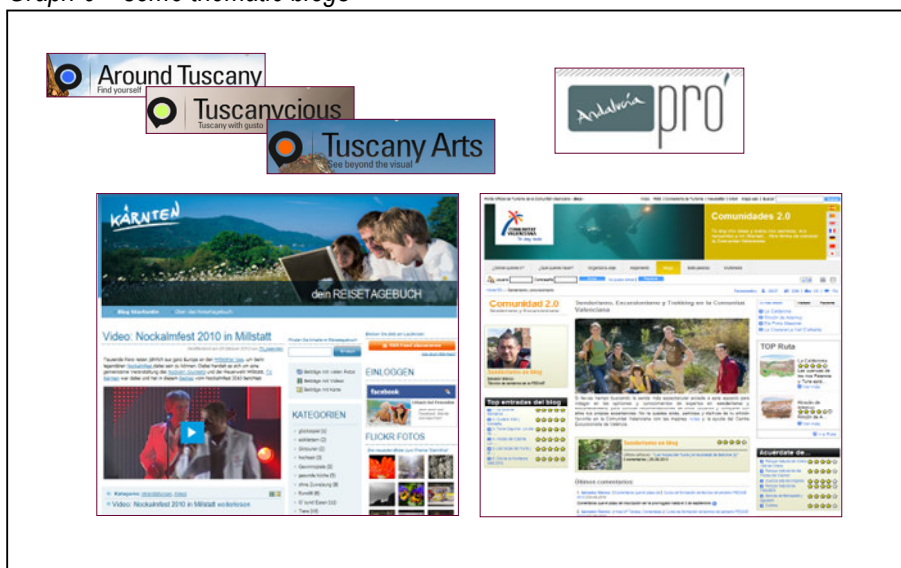
Tuscany is the Region that has more invested on social media. Besides Facebook, Twitter, YouTube e Flickr, the profile "In Toscana" is also on Friendfeed, Delicious, Current, Vimeo, Metacafe, Mogulus, Ustream, LinkedIn, Myspace, Hellotxt.

### Thematic blogs

At the moment there are 4 websites that have thematic blogs:

- Tuscany has 3 blogs which work within "All Things Tuscany" ([www.turismo.intoscana.it/allthingstuscany/network/](http://www.turismo.intoscana.it/allthingstuscany/network/)). There are thematic blogs in English: art (Tuscany Arts), food (Tuscanycibus) and place (Around Tuscany); each of them has its own profile on other social networks.
- Carinthia (<http://blog.kaernten.at>) has a blog which works as a "travel journal": after registration, tourists can publish articles and suggestions about Carinthia.
- The Valencian Community has a series of blogs connected to the section of the website "Communities 2.0" which tackle the following topics: Hiking, BTT (for mountain bike lovers), Diving, Surfing, Windsurfing and Kitesurfing
- Andalusia has a blog reserved for local tourism professionals (<http://turismoandaluz.wordpress.com>).

Graph 6 – some thematic blogs



### Other interaction tools

- 19 offer interactive geo – referenced maps , 8 have a geo - referencing system for type of products as well;
- 16 websites offer one or more email addresses for information requests;
- Several websites have one or more image galleries: 14 of them have a video gallery, 9 the virtual tour or a webcam system, 2 have an audio gallery (Tuscany and Trentino), 2 allow users to share and publish photos and videos by users (Valencia and Switzerland)
- 15 have a specialized area for media and press
- 15 offer the opportunity to share content directly on social network (through specific widgets)
- 14 have the newsletter
- 13 allow to download brochures, maps and tourism guidebooks

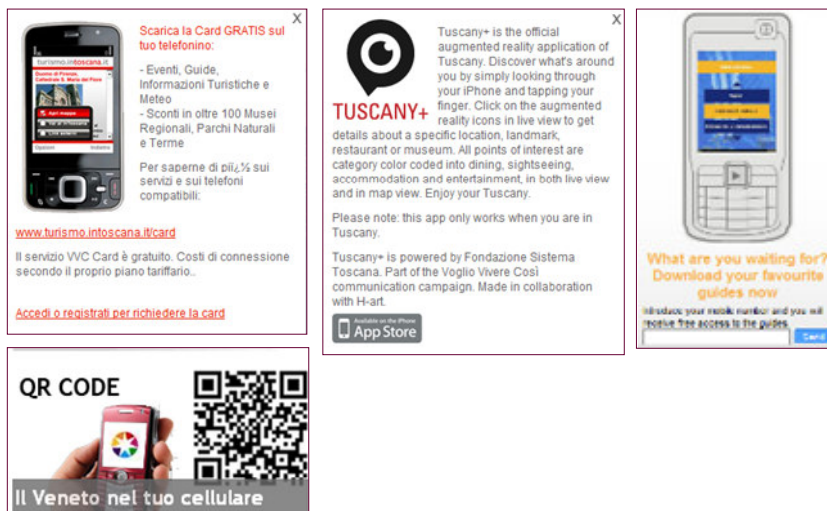
- 12 allow the saving of the content of interest in a reserved section; in three cases (NRW, Valencia and Andalusia) the saved content is automatically reassembled on a pdf document, which on turn can be saved and printed. This becomes a real personalised guide book. In the Andalusia's website, the "Travel Notebook" service allows even to select content and maps from the website which can be exported on GPS devices.
- 11 offer the opportunity to comment and/or grade the website content, 5 have adopted some feedback collection systems, 4 report tourist's reviews or have a link to the reviews written on websites such as TripAdvisor; Sweden and Switzerland allow users to leave reviews of the hotels which are present in their online booking systems.
- 10 have one or more online forms for the request of information
- 10 offer the opportunity to send e-cards or videos by email
- 6 have the Feed RSS system which allows users to receive news on real time on their own pc
- 4 have a help desk system; Algarve's website offers a chat service to "talk" on real time to an operator.

Applications for mobile and 'augmented reality'

Applications for mobile are becoming more and more popular and they are constantly evolving. Here are 4 cases:

- Tuscany
  - o "Voglio Vivere Così Card" (VVC) service free of charge to download on the mobile phone information, events, guidebooks and audio - guidebooks, discounts and promotions for museums and transports, etc.
    - "Tuscany+", the first "Augmented Reality" application created for tourism sector. It is an interactive guide on real time that users can use through their own smartphone. The application can be download free of charge from the Apple Store.
- Veneto → Veneto mobile, augmented reality service
- Brittany → guidebook for iPhone
- Valencia → <http://m.comunitatvalenciana.com/> specific website for mobile phone and TURIST MOVIL service, which allows the access to guidebooks on the phone by SMS

Graph 7 – Some applications for mobile phones



Positioning (data referring to the 22nd July 2010)

- Google PageRank<sup>7</sup> → 5,7 is the average value of the analysed websites. Trentino and Valencia have the highest one (7/10)
- World website popularity by Alexa Traffic Rank<sup>8</sup> → Switzerland (16.600<sup>^</sup> position), Tuscany (36.030<sup>^</sup>), Denmark (56.341<sup>^</sup>), Sweden (68.561<sup>^</sup>), Trentino (89.727<sup>^</sup>)
- Link popularity<sup>9</sup> → on average 686 back-links. Switzerland has the largest number: 2.769 links
- Google ranking analysis<sup>10</sup> → Carinthia is the first, good results also for Trentino, Normandy, Algarve, Cornwall, South-East England and Switzerland.
- Average number of pageviews → 3,9 for each visit, Switzerland has the largest number (6,2)
- Average visit duration → 3,5 minutes on average, more than 4 minutes for Switzerland (8,91), Tuscany (4,49), Carinthia (4,47) and Algarve (4,31)
- Bounce rate → 44,8% is the average value. Algarve (19,7%), Greece (29,6%), PACA (35,8%), Cornwall (38,9%) and Liguria (39,7%) have the lowest values.
- Upstream sites<sup>11</sup> → Google represents for all the selected websites the main access channel; Over 60% of users use Google for entering 12 websites out of 20. In two cases an important part of the online traffic comes from the official website of the Region (Algarve and Valencia). The access via Facebook is becoming more and more important as well (about 15% for Tuscany, NRW and Greece).
- Daily Average Number of unique visitors (data coming from interviews) → Trentino is the first with its 30.000 visitors during peak season and 11.500 visitors during the other months; then Tuscany and Sweden with 10.000 visitors and Andalusia with 8.200.

**4.ii. Institutional e-commerce strategies: some evidence**

Online booking

10 websites out of 20 have an online booking system:

- Booking and payment → Tuscany, Trentino, PACA, Brittany, Andalusia, NRW, Sweden and Switzerland
- Only booking → Liguria, Carinthia, Denmark

Other 5 destinations are working to have soon their own online booking system.

In 7 cases the system is directly managed by the same company/authority that manages the website, in other 3 cases the website management is assigned to professionals:

- In PACA the system is managed by "Franceguide", the National booking service that allows to enter more external websites, such as Booking.com, Niceres, etc.

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<sup>7</sup> "Google PageRank" is a numerical value (from 0 to 10) which Google gives to a web page. It represents one of the several elements to determine the page position among searched results: more the PageRank is high and more higher will be the positioning on Google.

<sup>8</sup> It is a unit to measure the popularity of a website. The index is calculated through the combination of two statistics: the average number of daily visitors and the average number of pageviews in the last 3 months. The indicator value represents a ranking (the most popular website has a Rank equal to 1).

<sup>9</sup> Number of websites that have a connection to the page of interest: a higher number of back-links means a better position, because links are considered as "suggestions" offered to visitors.

<sup>10</sup> Positioning results obtained entering the most popular key words which are (with certain exceptions) the name of the Region, which is sometimes hit together with "tourism" and "visit".

<sup>11</sup> Websites which have been visited by users before entering the one of interest.

- In Denmark the system is assigned to TouristOnline Ltd, a company owned by Visit Denmark, which is also the website's owner.
- Switzerland's website is managed by Switzerland Travel Centre, a company whose shareholders are FFS (Swiss Federal Railways) and Svizzera Turismo.

All these 10 online booking systems allow users to access to their accommodation offer. In some cases it is possible enter specific categories such as camping, villas and apartments.

The selection of accommodation by users is possible by choosing place and type of accommodation: 3 websites offer the opportunity to choose by type of product (Trentino, Carinthia, Sweden), 4 offer the opportunity to choose by type of service as well (Trentino, Carinthia, PACA, Brittany); Trentino website allows also a selection by customer typology (e. g. for kids, disabled people, families, singles, etc.).

For 6 cases out of 10, the system offers special promotion and packages.

Graph 8 – Some online booking systems



### Management policies

The following data have been collected during the interviews to the person responsible for the website. Not all the persons could give these information.

- Tuscany → If in possession of the regional code attesting their law compliance, operators can register themselves on the platform. It is free of charge and no commission is due. Arrangement payment is direct to operators. There is a ranking system on the homepage that rewards the most virtuos operators, who update prices and offers and receive the best grades/comments by users.
- Liguria → the 3.800 operators can be present free of charge on the online booking system; the Region boosts new registrations organising specific training courses. The operator has to update profile, prices, offers. The negotiation between users and operators is direct, but a copy of the transaction arrives also to the Regional Agency which manages the website.
- Trentino → The booking service is offered to all the accommodation operators but only the partners of the regional “Azienda per il Turismo” can use it. It is managed by Trentino Spa through a specific office in charge, which works with the local “Aziende per il Turismo” and accommodation businesses. The money transaction between user and operator is direct. Accommodation businesses have to follow some procedures to keep the content of their file up to date.
- NRW → it has an integrated system. Its partners are HRS, Hotel.de, Booking.de, My.IRS Tomas, Feratel, Nethotels.com and users can buy rooms through them. Operators apply to these partners and use their management policies.
- Denmark → Only accommodation businesses with a contract stipulated with Touristonline are present in their system. Tourists pay directly to operators.

### Not only accommodation: other e-commerce activities

Tuscany has an e-commerce area called “shop.intoscana” where the best products of the Region are available for purchase: food and wine products, design products, clothing and jewellery. The same situation appears in the “shopping” area of the Carinthia’s website.

Brittany sells also tickets for entertainment activities, cruises and other nautical activities, renting services of bikes and other means of transport.

Denmark's website has a service for booking restaurants. Sweden's website allows to book sport activities (e.g. a golf field) and special events.

Switzerland's website has a booking system for both airline and rail tickets.

**4.iii. iii. The Webbing Rank: who has a great belief in Web 2.0, and who tries carefully**

The Webbing Rank is a way based on the findings achieved to identify the best practices to emulate for a better tourism promotion on the Web. The ranking has followed these 5 variables:

- Communication strategy
- Interaction strategy and 2.0
- Results of communication and interaction strategies
- Results of positioning strategies
- Commercial strategy

A mark has been assigned for each variable and analysed website: 1 (low), 2 (sufficient), 3 (good), 4 (excellent). The sum of these values composes the Webbing Rank, which do not have a statistic significance, but represents a qualitative system to measure the analysed best practices and answer to the question: "Which Organisation is to emulate to build a successful promotion and marketing strategy on the Web?".

Tabella 2 → Webbing Rank

POS.	REGION	Communication	Interaction and Web 2.0	Results for communication+ Web 2.0	Positioning	Commercial Strategy	WEBBING RANK
1°	Tuscany	4	4	4	2	3	17
2°	Switzerland	3	3	3	4	3	16
	Trentino	3	3	2	4	4	16
3°	Carinthia	4	3	2	2	4	15
	Sweden	3	4	2	3	3	15
4°	Valencia	2	4	2	3	1	12
5°	Andalusia	2	3	2	2	2	11
	Denmark	2	3	1	3	2	11
6°	Brittany	1	3	1	2	3	10
	NRW	3	3	1	1	2	10
	Algarve	1	2	3	3	1	10
	Catalonia	3	3	2	1	1	10
7°	Cornwall	2	1	2	3	1	9
	Liguria	3	1	1	1	3	9
	Veneto	3	2	1	2	1	9
8°	Greece	1	1	3	2	1	8
	Normandy	3	1	1	2	1	8
	PACA	2	1	2	1	2	8
	S-E England	2	1	1	3	1	8
9°	Central Dalmathia	1	1	1	1	1	5

Here are the 5 websites that in consideration to the analysis of our research are to be considered the “best practices” to emulate:

<b>Website</b>	<b>Reason</b>
1° Tuscany <a href="http://www.turismo.intoscana.it">www.turismo.intoscana.it</a>	Social media strategy + excellent interaction with social network + skills to read, measure, and interpret Tuscany’s brand reputation on the web + continuous implementation of new Web 2.0 applications and tools + mobile and ‘augmented reality’
2° ex aequo Switzerland <a href="http://www.myswitzerland.com">www.myswitzerland.com</a>	Positioning results and website’s statistics + marketing strategy + interaction to tourists
2° ex aequo Trentino, <a href="http://www.visitrentino.it">www.visitrentino.it</a>	Marketing strategy + Positioning results + new tools and Web 2.0 applications
3° ex aequo Carinthia, <a href="http://www.carinthia.at">www.carinthia.at</a>	Skills to give an exhaustive content presentation on the parallel thematic websites + applications able to search customer oriented information
3° ex aequo Sweden, <a href="http://www.visitsweden.com">www.visitsweden.com</a>	High interaction level with users, first of all with the community + marketing strategy + search content procedure

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### **5. Web 2.0 and Tourism SMEs: 20 European cases of study**

The second part of Webbing aimed at studying a qualitative sample of 20 European accommodation businesses which have adopted communication and e-commerce strategies based on social media and Web 2.0. Here are the criteria used for selection:

- Geographical area → the same countries and regions involved in the first benchmarking study
- SMEs selection → 20 accommodation businesses which have adopted Web strategies, methodologies and Web 2.0 tools to interact with their customers such as social network accounts (Facebook, Twitter, Flickr, Youtube, etc.), blogs, sections on their own website where users can leave their comments, newsletters, communities/forums/clubs, etc.
- These 20 SMEs must have:
  - a good rating on the tourism reviews such as TripAdvisor, Expedia, etc. (or they must be recommended on other guidebooks and portals/promotion networks).
  - a considerable level of integration between Web marketing and disintermediation strategy, e.g. an internal online booking system, presence on the OLTA (Online Travel Agencies) platforms and on other similar websites, etc.
  - a status of leadership in the blogosphere in relation to *info-commerce* and *e-commerce* strategies.

In the selection we have considered different types of accommodation businesses. The sample includes small B&B and family-run hotels, medium to large-sized businesses, hotels belonging to small chains and luxury hotels.

The following table presents the 20 selected cases.

*Table 3 - The 20 selected SMEs*

<b>Paese</b>	<b>Regione/località</b>	<b>Nome struttura</b>	<b>Caratteristiche</b>	<b>Sito web</b>
<b>Italy</b>	Liguria, Diano Marina (IM)	<b>Grand Hotel Diana Majestic</b>	4 stars 86 rooms	<a href="http://www.dianamajestic.com">www.dianamajestic.com</a>
	Liguria, Savona	<b>Loano 2 Village</b>	4 stars 360 rooms	<a href="http://www.loano2village.it">www.loano2village.it</a>
	Tuscany, Siena	<b>Palazzo Ravizza</b>	3 stars historic house hotel	<a href="http://www.palazzoravizza.it">www.palazzoravizza.it</a>
	Tuscany, Elba	<b>Hotel Lacona</b>	4 stars 120 rooms	<a href="http://www.hotellacona.it">www.hotellacona.it</a>
	Trentino, Tavon (Coredo)	<b>Pineta Hotels</b>	Wellness Resort, 72 rooms	<a href="http://www.pinetahotels.it">www.pinetahotels.it</a>
	Veneto, Venice	<b>Ca' Nigra Lagoon Resort</b>	Design hotel 4 stars, 23 rooms	<a href="http://www.hotelcanigra.com">www.hotelcanigra.com</a>
<b>Spain</b>	Catalonia, Barcelona	<b>Nunez i Navarro Hotels</b>	Group of 9 hotels, 931 rooms (total number of rooms)	<a href="http://www.nnhotels.com">www.nnhotels.com</a>
	Com. Valenciana, Valencia	<b>Casa Rural Villa Florencia</b>	Rural hotel, 6 rooms	<a href="http://www.villa-florencia.es">www.villa-florencia.es</a>
	Andalucia, Seville	<b>Hotel Casa 1800</b>	4 stars, 24 rooms	<a href="http://www.hotelcasa1800.com">www.hotelcasa1800.com</a>
	Baleari, Minorca	<b>Artiemhotels</b>	Group of 3 hotels, 360 rooms	<a href="http://www.artiemhotels.com">www.artiemhotels.com</a>
<b>Portugal</b>	Algarve, Armação de Pêra	<b>Hotel Holiday Inn Algarve</b>	4 stars (Holiday Inn), 185 rooms	<a href="http://www.hialgarve.com">www.hialgarve.com</a>
<b>France</b>	PACA, Nice	<b>Hi Hotel</b>	Design hotel, 39 rooms	<a href="http://www.hi-hotel.net">www.hi-hotel.net</a>
	Île-de-France, Paris	<b>Hotel Le Meurice</b>	Luxury Hotel, 5 stars, 160 rooms	<a href="http://www.lemeurice.com">www.lemeurice.com</a>
<b>UK</b>	Cornwall, Newquay	<b>Watergate Bay</b>	3 stars, 57 rooms	<a href="http://www.watergatebay.co.uk">www.watergatebay.co.uk</a>
	London	<b>The Cavendish</b>	Luxury Hotel 4 stars, 230 rooms	<a href="http://www.thecavendish-london.co.uk">www.thecavendish-london.co.uk</a>
<b>Sweden</b>	Stockolm	<b>Hotel Skepps Holmen</b>	Design Hotel 4 stars, 81 rooms	<a href="http://www.hotelskeppsholmen.com">www.hotelskeppsholmen.com</a>
<b>Denmark</b>	Hovedstaden, Copenaghen	<b>Hotel Avenue</b>	Boutique Hotel 3 stars, 68 rooms	<a href="http://www.avenuehotel.dk">www.avenuehotel.dk</a>
<b>Germany</b>	Rheinland-Pfalz, Hornbach	<b>Hotel Kloster Hornbach</b>	4 stars, 34 rooms	<a href="http://www.kloster-hornbach.de">www.kloster-hornbach.de</a>
<b>Switzerland</b>	Canton Ticino, Lugano	<b>Hotel Lugano Dante</b>	4 stars, 83 rooms	<a href="http://www.hotel-luganodante.com">www.hotel-luganodante.com</a>
<b>Austria</b>	Carinthia, St. Daniel	<b>Bio Hotel Daberer</b>	4 stars and SPA, 68 rooms	<a href="http://www.biohotel-daberer.at">www.biohotel-daberer.at</a>

### **5.i. Social Web aims: listening to customers, conversing with them and keeping them loyal**

What do interviewees think about Web 2.0?

First of all, they consider it a group of powerful communication tools to invest in, because *“today the Web is fundamental and will be more and more important in the future”*.

The return on investment is expected on a qualitative level by creating *“more intensity and empathy in the relationships with customers”*.

For operators, 2.0 strategies address first of all to “the customers we already have”, before addressing the potential customers. In this way, relation skills can be transformed into repeat customers and feed the word of mouth.

Social media make the conversation bidirectional: not only do hotels talk to customers, but customers also talk to the hotels. It is easy to find on a hotel Facebook account not only the posts published by the hotel staff together with the comments left by customers, but also the posts written directly by customers which open a new conversation.

Table 4 - 2.0 characteristics of the selected websites- Summary

<ul style="list-style-type: none"> <li>• <b>Social networks</b></li> <li>• 12 accommodation businesses out of 20 have an account on Facebook</li> <li>• 17 have one on Twitter</li> <li>• 9 have a channel on You Tube</li> <li>• 7 are on Flickr</li> <li>• 5 have an account on other social networks (My Space, Foursquare, Delicious, Stumbleupon, Isuu)</li> <li>• 13 have a corporate blog</li> <li>• 1 has an internal community</li> <li>• <b>Reviews</b></li> <li>• 9 have a link to the main tourism review sites</li> <li>• 7 publish or show the comments related to its own hotel (which are published on these websites)</li> <li>• 5 have a guestbook where guests can leave comments or write about their experience</li> <li>• <b>Applications for mobile</b></li> <li>• 1 has a specific website which allows navigation through the smartphone</li> <li>• 1 has developed “augmented reality” applications</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Interaction and other tools</b></li> <li>• All the websites have a multimedia centre with different tools, such as photo and video galleries, music, webcam, virtual tour, e-cards, etc..</li> <li>• 17 websites have a newsletter</li> <li>• 8 display Rss Feeds</li> <li>• 5 allow to share content (with sharing tools)</li> <li>• 5 have a media area</li> <li>• 5 publish news and events of the local area as well</li> <li>• 4 offer the opportunity to be contacted via Skype or similar (e.g. via site phone)</li> <li>• <b>Online marketing strategy</b></li> <li>• 17 have an online booking system, two websites use a similar system where it can be asked for availability</li> <li>• 17 publish special offers and packages which can be booked online</li> <li>• 2 are affiliated to Nozip, a portal which promotes disintermediation and direct payment</li> <li>• 5 advertise competitions, discount voucher codes or options such as “Buy it for a friend” and similar</li> <li>• 3 sell other products in addition to packages and stays, also by a virtual shop.</li> </ul>
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Web 2.0 has deeply changed business communication in the interviewees’ experience. It is considered an advantageous investment compared with traditional advertising and communication because “ it offers business opportunities in faraway markets to small firms as well”.

At the same time, the relationship balance between firm and customer has been restored by a more “direct, authentic and deep” communication.

Web 2.0 helps businesses to consider customers as persons: marketing becomes conversation and promotion becomes an occasion of dialogue.

Entrepreneurs’ words explain well this concept:

- “Facebook is important to continue the relationship with guests. It helps them to feel still on holiday”, Paolo, Marketing Office
- “We have opened a fan page on Facebook to address new potential clientele, but first of all to keep existing guests loyal”, Paolo, Manager
- “Customers allow us to be part of their everyday life through social media. We think that the trend is only going to grow and we want to be where our clients are”, Fabricio, Business Development Coordinator
- “People want to identify themselves with others . They look what their friends have done, where they have been and they identify themselves with their choices”, Mai, Manager
- “The best of the Web is that you do not need to be big to succeed”, Mark, Manager and Owner.

A good Web 2.0 strategy works only if it is systemic and mixed. Interviewees told us that each social media has its own rules: more social media are needed to reach different customers and convey different messages. Mark said: “ Facebook and Twitter have different audiences. Facebook engages young people, whereas Twitter is more used for business relations. You Tube allows us to be “real”, but all of them are important”.

Graph 9 – Some examples of mixed social media strategies



19 accommodation out of 20 have a Facebook account accessible from the website with an average number of 1225 fans (data collected on October 2010). The fans number is not directly proportional to the accommodation size:

- Pineta Hotels (Trentino) has 72 rooms and 5172 fans (71 per room)
- Hotel Le Meurice in Paris has 190 rooms and 3.603 fans (19 per room)
- Villa Florencia has just 5 rooms but 2.655 fans (531 per room!)

The update frequency of Facebook accounts is particularly high, almost daily for half the cases. Interaction level is high as well: one or more “like” together with comments left by users are published (in response to posts) in 15 accounts at least. Customers often open the online conversation.

Together with Facebook, Twitter is used as well by 17 businesses out of 20. The followers number (346 on average on October 2010) and the interaction level measurable through the number of tweets (on average 284) are not yet very high. The update frequency is daily just in 5 cases out of 20.

What is it published on Facebook and Twitter? News, events and facts related to the hotel but also the territory, often accompanied by photos and videos, offers, competitions, guest reviews and comments, tales and experiences written by both staff and customers. In some cases, Facebook is used also for recruiting personnel.

The use of blogs is becoming more and more appealing as well. 13 businesses out of 20 have a blog, 5 have opened one in 2010. The update frequency is very high, at least weekly, in 5 cases daily. However the number of comments is still low. Arguments are very different, linked not only to the hotel but also to the blogger’s interests, which could concern the local history, culture and traditions. The contents which come out are: design, art, exhibitions and meetings, travel, lifestyle, music, events and experiences (e. g. the first snowfall, recipes, guests tales, eco-sustainability policies, etc.). The blog has not still developed all its potential but interviewees appreciate its value. Here are the most common answers to the question “ Why to open a blog?”.

- To have feeling with customers
- To engage customers in a personal and direct conversation
- To promote and share the hotel philosophy
- To communicate to customers boosting the hotel and the destination
- To increase the positioning on search engines

Graph 10 – Some analysed blogs



**5.ii. Social Web and tourism: who deals with it?**

The most part of these firms do not have a specific person in charge who deals only with the online activities. Managers, reception staff or owners (in small firms) usually deal with them. Just 3 businesses out of 20 have a specific person in charge and in one case the hotel has entrusted an external agency to deal with the online activities management. The most part of interviewees keep themselves up to date about Web 2.0 through specialized courses, texts, fairs, bourses and meetings. The preferred channel used to do it is the Web (online courses, blogs, websites, seminars and webinars), because it allows to “save time and money”.

**5.iii. Time and competences: hurdles to be overcome to succeed**

The “Time” factor appears as the most critical element concerning the work on the web:

- “I keep myself up to date using the Internet, when I have time“ Vicki, Sales Director.
- “Time is the resource to invest more in” Nicola, Partner
- “The most important investment is not more in money, but in time. We do not invest more in traditional methods such as publicity, advertising, etc., which were very expensive. The Web has replaced them, but it needs time and time is rare” Olga, Manager.
- “We have invested enough, but time is impossible to quantify”, Paolo, Marketing Department.

Online activities are very time-consuming. However, who deal with them are usually very busy persons (owners, managers, etc.) who have to deal with all the other things to do as well.

It is a “dangerous” contradiction: everybody knows that these activities need a lot of time, but it is difficult to dedicate a specific resource to them.

Even though the use of social media is considered strategically important, social media activities and their management are still considered one of the several tasks to carry out. It is necessary to achieve time and proficiency for them, but these investments cost money and.. consume time as well.

But what is the “ROI” generated by a good social media strategy? At the moment the return mainly consists of reputation and better relations with customers. Economic value is still hard to quantify.

- “It is still difficult to have an economic return, we may see it in the future” Paolo, Marketing Department.
- “My hotel recorded an increase of 26% of overnight stays, but I do not know which percentage depended on our Web policies”, Francesco, Owner.

- “People talk more about our hotel, and it is clear that what we expect are more bookings” , Vicki, Sales Director.
- “Currently, it is impossible to understand if a good online performance has really minimized the damages caused by the financial crisis or it represents a physiological change from off-line to on-line sales” Robi, Sales - Marketing – Advertising Manager.

#### 5.iv. Tourism reviews: enthusiasts and detractors

Online reviews are a matter of fact. The worse thing to do is to ignore them. Interviewees’ opinions are mostly positive: they consider online reviews (TripAdvisor, Zoover, Trivago, etc.) useful but some distinctions have been made. The enthusiastic supporters recognize that online reviews “have contributed to offer a better service and more attention to customers” and think they can “help to gain customer confidence and make the customer more faithful”.

Many of them are afraid of false comments, written by competitors. In fact it is not possible to verify user credentials.

The dealing of online reviews is entrusted mostly to the same persons who manage also the other online activities. This argument is very delicate, first of all what concerns negative reviews: almost everyone considers that is useful to answer all comments but with different procedures. Two interviewees prefer to answer privately in order to have “a more comprehensive and direct clarification” with the unsatisfied customer. Unfortunately, in this way it is not possible for other users to read about this clarification. Instead, they can read the negative comments. Small businesses consider the different situations case by case and try to understand if the review is true or false. The so called “supporters” think reviews are always to be answered: the negative one in order to find a solution, the positive one to thank the customers and make them faithful. Some persons are more critical and decide to not answer if comments are out of control such as on Tripadvisor. Others decide only to answer to negative reviews.

However it is clear that the number and the quality of reviews influence bookings and business. For better or for worse.

#### 5.v. The influence of 2.0 strategy on marketing

17 hotels out of 20 have an online booking system. Only Casa Rural – Valencia - (5 rooms) and BioHotel Daberer – Austria do not have one but BioHotel Daberer uses a specific *form* for booking requests. Almost all the systems allow to buy packages and to manage special offers.

Graph 11 – Some analysed on line booking systems



The number of online bookings is considered the most important (and the most desirable) indicator to measure the effectiveness of its own Web strategy. Why?

Tourism businesses often cooperate with the so called OLTA (Online Travel Agencies) such as Booking.com, Expedia, Venere, etc. It is an important channel which is able to draw firms and customers and reach “different markets”, “a difficult privilege to give up”.

Commissions are high and this is a big obstacle, especially for small businesses. The disintermediation represents without doubt the most desirable goal to reach, and the increase in direct booking would definitively be the easiest way. Web and 2.0 instruments constitute a valid resource to “gain visibility” and build “new direct relationships” without intermediation, commissions and costs.

The Roi generated by a Web strategy is also measurable by calculating the increase in number of direct sales. Paolo, Marketing Manager, explains: “Web and Web 2.0 help to activate disintermediation processes. OLTA are important because allow to reach new markets. The challenge is that a customer arrives here now through an OLTA, and next year will come back through our website.”

The selected businesses have registered on average a turnover generated directly by the online booking of 20% compared to the total amount of sales vs a 17% generated through the OLTA. There are also three cases that work without any kind of intermediation.

This is the possible evolution of tourism scene: a decrease in traditional off-line sales, the overcoming of traditional travel agencies and the total disintermediation of tourism businesses.

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## 6. Lesson learnt during Webbing: adopt the technology and embrace the philosophy

Facebook and Twitter are the most used social networks. TripAdvisor is the most well-known, and in such cases dreaded, review website. The websites which have original and updated contents, translated in more languages, are the most “valid” strategy for the institutional tourism promotion.

Tourism is becoming more and more “social”, Web and interaction are playing a more relevant role.

The 2.0 technology is needed but it is not enough. To succeed, tourism economy needs the “2.0 philosophy”, i.e., the comprehension of current phenomena, and the sharing of those values which are changing the pillars of the whole tourism sector. A “2.0 philosophy” that puts customers at the centre and appreciates not only the increase of the turnover, but also a better relation with them.

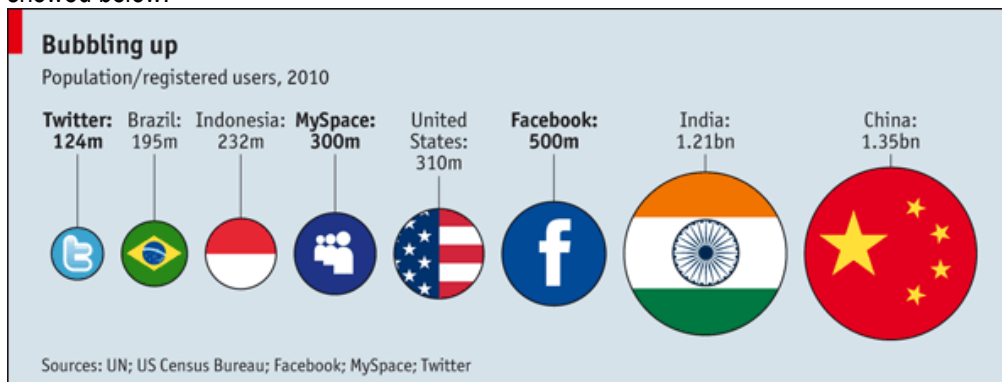
Between philosophy and technology, here is the Webbing lesson learnt:

1. Web 2.0 improves the relations with customers.
2. Word of mouth and customer loyalty are the main results expected by investments on Web 2.0.
3. Web 2.0 strategy works only if integrated and systemic.
4. Each social media has its rules: to reach more typologies of interlocutors and transfer more type of messages, it is important to use more social media.
5. Managers and other persons in charge, who deal with online strategies, keep themselves up to date through the Web (blogs, websites and online courses).
6. A good performance using Web 2.0 needs time and competences. All the firms confirm it, but not all the firms dedicate a specific person to do that.
7. What is the ROI of a social media strategy? It is hard to quantify economic values. The return is on reputation and relation with customers.
8. Quantity and quality of reviews influence business.
9. Reviews can worry, but they are an opportunity as well. To take advantage of them, the better solution is always to answer them.
10. The most desirable goal is the disintermediation: this result is one of the most important parameter to measure the ROI of the promotion strategy on the Web.

## 7. Final considerations: an invitation to the new

During our long working experience as researchers and consultants for enterprises and institutions, we have often heard leaders affirming prejudicial assertions such as “there is anything on the Web”, “social networks are not reliable”, “now even its supporters criticize Web 2.0”.

These are certainly legitimate opinions, but they distort a reality that is more complex and difficult to hide: there are 2 milliards of Web users worldwide<sup>12</sup>, millions and millions enterprises are constantly online, tourism content are 50% more than other information on the Web, relations on social networks are increasing as showed below:



The matter of “what the Web has become” and “if businesses (in particular tourism businesses) need it or not” has to be arise in another way. The Web has not to be glorified or demonized, but it is necessary to know it deeply. We have to enhance public and private competences. It is necessary to learn, emulate, experiment and innovate continuously. We cannot do less.

It is not a small matter, especially if we consider all the obstacles such as the necessity of a wider broadband access, and the difficult transfer of competences and technologies.

A faster way, more significant on the social level, could be the creating of occasions for digital-natives: young people between 20-30 years old, graduates and not, who cooperate, exchange and share online both serious and recreational information. They use the Web as the most natural infrastructure and live, according to “the Socratic method”, discovering, learning and also looking for new jobs. They are able to develop spontaneously new technologies and services like Steve Jobs did.

It is time to become aware of the advantages of the so called “youth matter“, eluded by those leaders: an enormous cultural, technological and social potential which could be used as first in tourism thanks to its territorial mission and its peculiar offer, leaving old schemes and outdated approaches.

<sup>12</sup> Cfr. Internet World Stats – Usage and Population Statistics 2010.