

# POLITECNICO DI MILANO

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Master of Science in Management Engineering

Sustainable Operations Management and Social Innovation



## **THE DIGITIZATION OF THE ITALIAN HOSPITALITY INDUSTRY: AN EMPIRICAL ANALYSIS**

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# Abstract

In the last decades the hospitality industry has strongly been impacted by a Digital Revolution, which has introduced new solutions that can support the actors of the sector in improving their performances (e.g. enhancing bookings or increasing profits).

The general objective of this work is to try to answer the following questions about the hospitality industry: *What are the changes? What are the opportunities? What are the threats? How an actor of the hospitality industry can achieve its objectives?* However, this work is also aimed at answering more specific questions. The analysis will be narrowed down to the reality of the Italian hospitality industry and in particular, the focus will be on accommodation facilities and restaurant activities. Considering these boundaries, the objectives are:

- Determining what are the dominant behaviours and attitudes of Italian accommodation facilities and restaurant activities.
- Formulating hypotheses about the reasons behind dominant behaviours and attitudes and also trying to verify these hypotheses.
- Underlying some activities or strategies that seem to be more correlated to improvement of performances (direct bookings, expected revenues, ...).

In order to accomplish these goals two separate researches, involving Italian accommodation facilities and restaurant activities, were carried out, in collaboration with the Observatory Digital Innovation in Tourism of the School of Management of Politecnico di Milano.

The context emerged from the analysis shows an Italian hospitality industry that is generally positive about the role of the Internet companies, which are often considered an opportunity, despite some criticalities. However, the attitude towards digital channels is not homogeneous within the industry: restaurant activities are still very linked to non-digital channels and the role of third parties is minimum (on average it is the 8% of the total bookings); while for accommodation facilities digital channels are very relevant for both direct and indirect channels, which represent on average the 57% of total bookings. Furthermore, also inside the accommodation facilities category there are some differences: thanks to their financial resources, hotels tend to promote their own channels more than the others non-hotels facilities, which are more likely to exploit third online parties.

# Italian abstract

Nell'ultima decade l'industria dell'ospitalità è stata fortemente impattata da una Rivoluzione Digitale, la quale ha introdotto nuove soluzioni che possono supportare gli attori del settore nel miglioramento delle proprie performance (es. incrementando le prenotazioni o aumentando i profitti).

L'obiettivo generale di questo lavoro è quello di tentare di rispondere alle seguenti domande sull'industria dell'ospitalità: *Quali sono i cambiamenti? Quali sono le opportunità? Quali sono le minacce? Come un attore dell'industria dell'ospitalità può raggiungere i suoi obiettivi?* Tuttavia, questo lavoro ha anche lo scopo di rispondere a domande più specifiche. L'analisi verrà ristretta alla realtà dell'industria dell'ospitalità italiana e in particolare, il focus sarà su strutture ricettive e attività ristorative. Considerando questi confini, gli obiettivi sono:

- Determinare quali sono i comportamenti e le attitudini dominanti delle strutture ricettive e delle attività ristorative italiane.
- Formulare ipotesi sulle ragioni dietro i comportamenti e le attitudini dominanti ed anche cercare di verificare queste ipotesi.
- Evidenziare alcune attività e strategie che sembrano essere maggiormente correlate a miglioramenti delle performance (prenotazioni dirette, aspettativa di fatturato, ....)

Al fine di raggiungere questi obiettivi, in collaborazione con l'Osservatorio Innovazione Digitale nel Turismo della School of Management del Politecnico di Milano, sono state eseguite due differenti ricerche, coinvolgenti strutture ricettive e attività ristorative italiane.

Il contesto emerso dall'analisi mostra un'industria dell'ospitalità italiana che è generalmente positiva riguardo al ruolo delle Internet company, le quali sono spesso considerate un'opportunità, nonostante alcune criticità. Tuttavia, l'attitudine verso i canali digitali non è omogenea all'interno del settore: le attività ristorative sono ancora molto legate ai canali non-digitali ed il ruolo di terze parti è minimo (in media è l'8% delle prenotazioni complessive); mentre per le strutture ricettive i canali digitali sono molto rilevanti sia per le prenotazioni dirette che per quelle indirette, le quali rappresentano il 57% delle prenotazioni totali. Inoltre, anche all'interno della categoria delle strutture ricettive ci sono alcune differenze: grazie alle loro risorse finanziarie, gli hotel tendono a promuovere i propri canali più delle altre strutture extra-alberghiere, che sono invece più propensi a sfruttare terze parti online.

# Executive summary

In the last decade the hospitality industry has strongly been impacted by a Digital Revolution, which has introduced new solutions that can support the actors of the sector in improving their performances (e.g. enhancing bookings or increasing profits). The first part of this paper, consisting in a literary review, is about trying to understand these changes and the objective is to answer the following questions: *What are the changes? What are the opportunities? What are the threats? How an actor of the hospitality industry can achieve its objectives?*

In order to follow this purpose, it was necessary a first clarification of what are the actors representing this industry and the main characteristics of the customers. From this analysis, it emerged that the two main businesses of the industry are accommodation facilities and restaurant activities; but it was also underlined that the environment is made of several actors, very different one to each other. In fact, it is important considering that the business of accommodation facilities is not only hotel, but it encompasses also bed and breakfasts, hostels, camping, vacation rentals and so on. Also the concept of “restaurant activity” is not limited to restaurant, but it includes also bars, catering activities as well as collective restaurant activities (e.g. a restaurant activity inside an enterprise). After these general considerations, the literary review moves to the analysis of how the Digital Revolution has impacted/ is impacting the hospitality industry. The actors of the hospitality should be aware of the new solutions because they can really support their business and because the online market is becoming more and more relevant; let us consider that the online transactions of Italian accommodation facilities keep on increasing and it is estimated a growth of 10% from 2016 to 2017 (Osservatorio Innovazione Digitale nel Turismo of the School of Management of Politecnico di Milano, 2017). From the analysis of the impact that the Digital Revolution had – and still have – on the hospitality industry, three main elements have emerged. The first element is about the digitization of the media, which has increased the number of different instruments that can be used for communication, like website, social network accounts, instant messaging and so on. The actors of the hospitality can exploit these channels for promoting their business, also leveraging on the “storytelling”, which can be defined as the narration of a story that is able to generate feelings, present the characteristics of the product and create the desire for it<sup>1</sup>. The online channels can also be useful for collecting bookings

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<sup>1</sup> Definition that takes inspiration from a Gianluca Fiscato’s article: Fiscato G. (2012) Cos’è lo storytelling? Sette punti per comprenderlo. Fourmarketing.com

and thus, becoming additional sale channels; a book engine can be fundamental for this purpose. Anyway, despite the functions that digital channels might have, it is necessary the creation of traffic towards them and there are several instruments that can be supportive, like Search Engine Marketing (SEM), advertising on social network and so on. The second element emerged from the analysis, is that the Digital Revolution has provided new digital technologies for managing the operations of accommodation facilities and restaurant activities. Among all the different solutions, there are also instruments for the management and the elaboration of data, like business intelligence methodologies, that can be useful to improve different performances, including service level, revenues, costs and so on. The input of this instruments can be Big Data, which are useful for better understanding the external environment, but also Small Data, that can be more effective in understanding the customers of a company. The third element that has emerged was the support that new online actors (i.e. Internet company) can give to the providers of the hospitality. However, the relationships between online and offline actors is not simple and is quite controversial. It is undeniable that new actors can really be a source for increasing bookings (e.g. OTAs and metasearch) or revenues (e.g. food delivery apps), but there are also some criticalities to consider. Talking about OTA some of the problems that accommodation facilities may face are: increase of booking cancellations, overbooking related to allotment, the obligation of respecting the parity rate and the fact that some OTAs do not share information about the guests. Furthermore, the promotion activities of OTAs, using an accommodation facility's keywords, might contrast the promotion activities of the facility itself: basically, OTAs may "steal" customers to the accommodation facilities. In the dispute about the role of OTAs, it should be also consider that according to some studies (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009), these portals might also increase direct bookings: this phenomenon is called "billboard effect". Inside the category of OTAs there are also some home sharing portals like Airbnb, which are responsible for the growth popularity that short term rentals are assessing in recent years. This form of vacation may really have a positive impact on economic, social and environmental point of view, but there are some criticalities on legal point of view and concerning with the type of tourism promoted. Also review portals can be a supportive instrument for accommodation facilities, because they can improve the visibility and allow to collect feedbacks from customers. Furthermore, a study by Chris Anderson showed that hotels with good ratings can improve their profitability (Anderson, The Impact of Social Media on Lodging Performance, 2012). Anyway, because of these opportunities and the popularity that these portals have, some opportunistic behaviours have arisen and thus, it is important for both the actors of hospitality and the staff of the sites to monitor reviews. Among the different online actors, restaurant

activities can exploit the opportunities offered by some apps/portals, like online table reservation apps and food delivery apps. The formers can be useful to reduce “empty” tables and thus improve the saturation of the dining hall; anyway, exploiting these apps lead to: a loss of personal connection with customers, commissions to pay to the providers and the risk of sacrificing customers to the competition (Kimes, 2009). On the other side, although most of the food delivery services worldwide are still offline, food delivery apps are becoming more and more relevant and this is also thanks to the fact that some apps can support restaurant activities even in the logistics.

After the understanding of the environment, thanks to the literary review, the second part of this paper aims at going more in depth. The analysis will be narrowed down to the reality of the Italian hospitality industry and in particular, the focus will be on accommodation facilities and restaurant activities. Considering these boundaries, the objectives will be:

- Determining what are the dominant behaviours and attitudes of Italian accommodation facilities and restaurant activities.
- Formulating hypotheses about the reasons behind dominant behaviours and attitudes and also trying to verify these hypotheses.
- Underlying some activities or strategies that seem to be more correlated to improvement of performances (direct bookings, expected revenues, ...).

In order to accomplish these goals, in collaboration with the Observatory Digital Innovation in Tourism of the School of Management of Politecnico di Milano two separate researches, involving Italian accommodation facilities and restaurant activities, were carried out.

The first element emerged from the empirical analysis, was a significant difference in the booking channels among accommodation facilities and restaurant activities. The formers showed to be more dependent on intermediaries, with direct bookings representing on average the 43% of the total bookings; furthermore, the digital channels - both direct and indirect – resulted as dominant. On the other side, in restaurant activities, the role of third parties is minimum, with direct reservation representing the 92% of the totals (on average); moreover, most of the bookings are from non-digital channels. Considering how the actors of hospitality promote their direct channels, the results showed that both accommodation facilities and restaurant activities are very present online: website is used by the 83% of accommodation facilities and 81% of restaurant activities, while social network are exploited by 63% of accommodation facilities and 60% of restaurant activities. Anyway, advertising on these channels is not very diffused and this is probably related to the fact that it is not perceived

as an effective instrument: only the 13% of accommodation facilities respondents considers advertising on search engines effective and similarly, advertising on social networks is perceived effective by only the 9%. Probably, the reason of this is that advertising should be integrated with other activities, that require additional investment and/or time; thus, not all the enterprises can implement them. So, in order to understand if more comprehensive approaches – rather than the simple advertising – can really provide a benefit, six different strategies were investigated (3 for accommodation facilities and 3 for restaurant activities). The strategies considered were the followings:

- Matching of search engine advertising with the use of a book engine on the website of the accommodation facility (it was called “Engine strategy”).
- Matching of the advertising on social networks with the use of social networks related to images (e.g. Instagram) and the dedication of more than 6 hours/week to this channel by an accommodation facility (it was called “Social strategy”).
- Collection of both anagraphical and behavioural data about the guests of the facility.
- Matching of search engine advertising with the optimisation of the website of the restaurant activity for mobile.
- Matching the advertising on social network with the use of social networks related to images (e.g. Instagram) by the restaurant activity.
- Matching of the use of the use of advertising on search engine and/or social networks with the possibility of booking through the website of the restaurant activity and/or social network (it was called “Book engine strategy”).

From the investigation, it was assessed that generally the application of one of these strategies, seems to really increase the impact of online direct bookings. Nevertheless, sometimes the application of a comprehensive strategy showed also to be correlated with a decrease of offline direct bookings that might compromise the overall direct reservations. It is possible conjecturing that companies applying these strategies, tend to dedicate too much time on online channels – also because they have to be monitored – and so, forget about the importance of offline instruments, like leaflets or manifests. Moving to the digital technologies for the management of the operations, it has emerged another difference between accommodation facilities and restaurant activities; in fact, the formers are more likely to use these instruments: 80% of accommodation facilities has introduced at least one technology, against the 40% of restaurant activities. Among the most diffused solutions adopted by accommodation facilities there is Web analytics software, which seems to be correlated to higher

percentage of direct bookings (+2 percentage points) and lower from OTAs (-3 percentage points) and other non-OTA portals (-3 percentage points). Another interesting instrument is represented by business intelligence analytics; this solution does not seem to be correlated to higher percentage of direct bookings, but facilities implementing it had a better expectation about 2017 overall revenues. It is possible conjecturing that this instrument may be not related to improvement in direct bookings, but to more revenues; for instance, business intelligence methodologies can help in setting the optimal price. Among the less diffused technologies there is CRM; this instrument does not seem to be correlated to improvement in direct bookings, but the integration with other solutions might help to improve this performance. The analysis of the digital technologies also showed that accommodation facilities more linked to business travel tend to implement innovative solutions more than the others. Thus, it is possible assuming that also the characteristic of the customer base of an accommodation facility can influence the adoption of new technology for the management of the operations. Then, the analysis moved to the relationship with online actors, that are generally perceived positively by the actors of the Italian hospitality industry. First of all, the 66% of accommodation facilities considers OTAs an opportunity and it is possible conjecturing that behind this positiveness there might be also the billboard effect: in fact, 76% of respondents affirms that OTAs have also improved their direct bookings. Furthermore, it looks like the facilities affirming that OTAs do not improve their direct bookings, use a book engine and/or accept prepaid cards for booking less than those that assess the improvement. Thus, it is possible conjecturing that for exploiting the billboard effect, being present on OTAs is not enough, but it is important having instruments that allow to collect direct bookings easily. The actors of the Italian hospitality industry seem also to be positive about review portals, which are considered an opportunity by the 56% of accommodation facilities and the 49% of restaurant activities. Anyway, there are also negative opinions: the 18% of accommodation facilities considers these portals a problem, as well as the 28% of restaurant activities; and most of the complaints are about the lack of control on the reviews. However, it looks like answering negative reviews might help; in fact, those applying this practice seem to be more optimistic about the portals: in this case, the percentage of respondents considering review portals an opportunity is higher of 7 percentage points in accommodation facilities and of 11 percentage points in the restaurant activities. Beside review portals, the actors of hospitality can collect reviews from their own channels (e.g. on social networks). Anyway, the decision of collecting reviews through website and/or social network accounts, does not seem to exclude external portals: in fact, the 93% of accommodation facilities collecting reviews on the website or on social networks also reads reviews on external portals; and the same is for the 91% of the restaurant activities collecting reviews on website or social networks.

Among restaurant activities also the applications/portals about food are becoming very popular: the 52% of respondents is present in at least one of them and the most diffused seem to be those concerning with the findings of restaurants, helped by reviews. The second most diffused are apps/portals for the online table reservation, which are considered an opportunity by the 27%, and the percentage is higher of 19 percentage points considering restaurant activities that use them. Thus, the positiveness is high, also despite the fact that the restaurant activities using these apps have a slight lower percentage of direct bookings. It is possible conjecturing that the advantages provided by online table reservations apps/portals are considered more important than the higher intermediation that they might generate. The least diffused apps are those concerning with food delivery, which are not very known by the respondents: in fact, the 19% does not know what they are. Anyway, this low awareness might be related to the fact that the providers of the service (e.g. Deliveroo, JustEat, ...) have always focused on big cities, without giving a particular attention to provinces. The last analysis made in the empirical analysis consisted in comparing the different type of accommodation facilities in terms of booking channels and of how they make online promotion. It emerged that thanks to higher financial resources, hotels tend to promote their owned channels more than the others and they seem to prefer OTAs to the other portals, which are exploit by only the 26% of hotels. On the other side, bed and breakfasts, lodging facilities in rural areas and vacation rentals have less financial resources and thus, tend to have a different approach: in fact, it seems that most of them do not give particular attention to the promotion of their own channels. The online activity of bed and breakfast seems to be strictly linked to OTAs and only the 22% is present on non-OTA portals. OTAs resulted fundamental also for the online activity of lodging facilities in rural areas; but these facilities also give a certain importance to other non-OTA portals, which are exploited by the 46% of these facilities and represent on average, the 18% of their total bookings. If for bed and breakfasts and lodging facilities in rural areas OTAs are fundamental, for vacation rentals are “vital”, since they represent the 52% of total bookings.

# Italian executive summary

Nell'ultima decade l'industria dell'ospitalità è stata fortemente impattata da una Rivoluzione Digitale, la quale ha introdotto nuove soluzioni che possono supportare gli attori del settore nel miglioramento delle proprie performance (es. incrementando le prenotazioni o aumentando i profitti). Queste soluzioni includono: nuovi canali e strumenti per coinvolgere e comunicare con i clienti, nuove tecnologie – o software/applicazioni – per gestire le “operations” e anche la possibilità di sfruttare le relazioni con nuovi attori online, come OTA, metasearch, siti di recensione e così via.

Al fine di raggiungere questo obiettivo, è stata necessaria una prima chiarificazione su quali sono gli attori che costituiscono questo settore e le caratteristiche principali dei clienti. Da questa analisi è emerso che i business principali del settore sono strutture ricettive e attività ristorative; ma è stato anche evidenziato che il contesto è fatto di vari attori, molto diversi l'uno dall'altro. Infatti, è importante considerare che il business delle strutture ricettive non è solo hotel, ma comprende anche: bed and breakfast, ostelli, campeggi, case vacanza e così via. Anche il concetto di “attività ristorativa” non è limitato ai soli ristoranti, ma include anche bar, attività di catering, così come attività ristorative collettive (es. mensa in azienda). Dopo queste considerazioni generali, l'analisi della letteratura si sposta ad analizzare come la Rivoluzione Digitale ha impattato/sta impattando l'industria dell'ospitalità. Gli attori dell'ospitalità devono essere consapevoli delle nuove soluzioni, poiché esse possono davvero supportare la loro attività e perché il mercato online sta diventando sempre più importante; basta considerare che le transazioni online delle strutture ricettive italiane continuano a crescere ed è stimata una crescita del 10% dal 2016 al 2017 (Osservatorio Innovazione Digitale nel Turismo of the School of Management of Politecnico di Milano, 2017). Dall'analisi dell'impatto che la Rivoluzione Digitale ha avuto – e continua ad avere – sull'industria dell'ospitalità, sono emersi tre elementi fondamentali. Il primo elemento riguarda la digitalizzazione dei media, che ha aumentato il numero di diverse strumenti che possono essere utilizzati per la comunicazione, come il sito internet, gli account sui social network, la messaggistica istantanea e così via. Gli attori dell'ospitalità possono utilizzare questi canali per promuovere la propria attività, sfruttando anche lo “storytelling”, che può essere definito come la narrazione di una storia che è in grado di generare sentimenti, presentare le caratteristiche del prodotto e creare un desiderio per esso<sup>2</sup>. I canali online possono essere utili anche

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<sup>2</sup> Definition that takes inspiration from a Gianluca Fiscato's article: Fiscato G. (2012) Cos'è lo story telling? Sette punti per comprenderlo. Fourmarketing.com

per raccogliere le prenotazioni e quindi, diventano un canale di vendita aggiuntivo; per questo scopo, un book engine potrebbe essere fondamentale. Tuttavia, indipendentemente dalle funzioni che i canali online possono avere, è necessario creare un traffico su di essi e ci sono diversi elementi che possono aiutare, come il Search Engine Marketing (SEM), la pubblicità sui social network e così via. Il secondo elemento emerso dall'analisi è che la Rivoluzione Digitale ha fornito nuove tecnologie digitali per gestire le operations di strutture ricettive e attività ristorative. Fra le varie soluzioni ci sono anche strumenti per la gestione e l'elaborazione dei dati, come le metodologie di business intelligence, che possono essere utili per migliorare diverse performance, fra cui il livello di servizio, i ricavi, i costi e così via. L'input di questi strumenti possono essere I Big Data, i quali sono utili per comprendere meglio l'ambiente esterno, ma anche gli Small Data, che possono essere più utili a capire i clienti dell'azienda. Il terzo elemento che è emerso, è stato il supporto che i nuovi attori online (ovvero Internet company) possono dare ai fornitori dell'ospitalità. Tuttavia, le relazioni fra attori online e offline non sono semplici e sono abbastanza controverse. È innegabile che i nuovi attori possono davvero essere un mezzo per aumentare le prenotazioni (es. OTA e metasearch) o i ricavi (es. app di food delivery), ma ci sono anche delle criticità da considerare. A proposito delle OTA, alcune problematiche che le strutture ricettive potrebbero riscontrare sono: aumento delle cancellazioni, overbooking legati all'allotment, l'obbligo di rispettare la parity rate e il fatto che alcune OTA non condividano informazioni sui futuri ospiti. Inoltre, le attività di promozione delle OTAs che utilizzano le keywords di una struttura ricettiva, potrebbero contrastare la promozione della struttura stessa: di fatto, le OTA potrebbero "rubare" clienti alle strutture ricettive. Nella disputa sul ruolo delle OTA, bisogna anche considerare che secondo alcuni studi (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009), questi portali potrebbero anche aumentare le prenotazioni dirette: questo fenomeno è chiamato "billboard effect". Nella categoria delle OTA rientrano anche alcuni portali home sharing come Airbnb, che sono responsabile dell'aumento di popolarità che affitti brevi stanno avendo oggi. Questa forma di vacanza può davvero avere un impatto positivo dal punto di vista economico, sociale ed ambientale, ma ci sono alcune criticità dal punto di vista legale e legate al tipo di turismo che viene promosso. Anche i portali di recensione possono essere uno strumento di supporto per le strutture ricettive e per le attività ristorative, poiché possono migliorare la visibilità e permettono di raccogliere feedback dai clienti. Inoltre, uno studio di Chris Anderson ha mostrato che gli hotel con buoni punteggi possono aumentare la profittabilità (Anderson, The Impact of Social Media on Lodging Performance, 2012). Tuttavia, a causa di queste opportunità e alla popolarità che hanno questi portali, sono sorti alcuni comportamenti opportunistici e risulta quindi importante sia per gli attori dell'ospitalità, che per lo staff dei siti,

monitorare le recensioni. Fra i diversi attori online, le attività ristorative possono sfruttare le opportunità offerte da alcune/i app/portali, come quelle legate alla prenotazione online del tavolo o quelle legate al food delivery. La prima tipologia di app può aiutare a ridurre i tavoli “vuoti” e quindi a migliorare la saturazione della sala da pranzo; tuttavia, lo sfruttamento di queste app porta a: una riduzione del contatto personale coi clienti, commissioni da pagare ai fornitori del servizio e il rischio di perdere la clientela in favore dei competitor (Kimes, 2009). Invece, sebbene la maggior parte dei servizi di food delivery a livello mondiale siano ancora offline, le app di food delivery stanno crescendo e questo è anche grazie al fatto che alcune app supportano le attività ristorative anche nella logistica.

Dopo la comprensione del contesto, grazie all’analisi della letteratura, la seconda parte di questo lavoro vuole andare più in profondità. L’analisi verrà ristretta alla realtà dell’industria dell’ospitalità italiana e in particolare, il focus sarà su strutture ricettive e attività ristorative. Considerando questi confini, gli obiettivi sono:

- Determinare quali sono i comportamenti e le attitudini dominanti delle strutture ricettive e delle attività ristorative italiane.
- Formulare ipotesi sulle ragioni dietro i comportamenti e le attitudini dominanti.
- Evidenziare alcune attività e strategie che sembrano essere maggiormente correlate a miglioramenti delle performance (prenotazioni dirette, aspettativa di fatturato, ....)

Al fine di raggiungere questi obiettivi, in collaborazione con l’Osservatorio Innovazione Digitale nel Turismo della School of Management del Politecnico di Milano, sono state eseguite due differenti ricerche, coinvolgenti strutture ricettive e attività ristorative italiane.

Il primo elemento emerso dall’analisi empirica è stata una differenza significativa nei canali di prenotazione fra strutture ricettive e attività ristorative. Le prime hanno mostrato di essere maggiormente dipendenti dagli intermediari, con le prenotazioni dirette che rappresentano in media il 43% delle prenotazioni totali; inoltre, i canali digitali – sia diretti che indiretti – sono risultati dominanti. Al contrario, nelle attività ristorative il ruolo di terze parti è minimo, con le prenotazioni dirette che rappresentano il 92% di quelle totali (di media); inoltre, la maggior parte delle prenotazioni provengono da canali non digitali. Considerando come gli attori dell’ospitalità promuovono i propri canali, è risultato che sia strutture ricettive che attività ristorative sono molto presenti online: il sito internet è utilizzato dall’ 83% delle strutture ricettive e dall’81% delle attività ristorative, mentre i social network dal 63% delle strutture ricettive e dal 60% delle attività ristorative. Tuttavia, la

pubblicità di questi canali non è molto diffusa e questo è probabilmente legato al fatto che non è percepito come uno strumento efficace: solo il 13% delle strutture ricettive rispondenti considera la pubblicità sui motori di ricerca efficace e analogamente, la pubblicità sui social network è percepita efficace solo dal 9%. Probabilmente, la ragione di ciò è che la pubblicità deve essere integrata con altre attività che richiedono investimenti aggiuntivi e/o tempo; quindi, non tutte le aziende possono implementarle. Dunque, al fine di comprendere se approcci più completi – piuttosto che la semplice pubblicità – possono effettivamente fornire beneficio, sei diverse strategie sono state investigate (3 per le strutture ricettive e 3 per le attività ristorative). Le strategie considerate sono state le seguenti:

- Integrazione della pubblicità sui motori di ricerca con l'utilizzo di un book engine sul sito della struttura ricettiva (è stata chiamata "Engine strateg").
- Integrazione della pubblicità sui social network con l'utilizzo di social network legati alle immagini (es. Instagram) e con lo spendere più di 6 ore/settimana sui social network in cui la struttura è presente (è stata chiamata "Social strategy").
- Raccolta sia di informazioni anagrafiche che comportamentali sui clienti della struttura.
- Integrazione della pubblicità sui motori di ricerca con l'ottimizzazione del sito internet dell'attività ristorativa per mobile.
- Integrazione della pubblicità sui social network con l'utilizzo di social network legati alle immagini (es. Instagram) da parte dell'attività ristorativa.
- Integrazione dell'advertising sui motori di ricerca e/o sui social network con la possibilità di prenotare tramite il sito dell'attività ristorativa e/o i social (è stata chiamata "Book engine strategy").

Dall'indagine, è stato verificato che generalmente l'applicazione di una di queste strategie sembrerebbe portare ad un maggiore impatto delle prenotazioni digitali dirette. Ciononostante, a volte l'applicazione di strategie complete si è mostrata correlata ad un minore impatto delle prenotazioni offline dirette, che potrebbe compromettere le prenotazioni dirette complessive. È possibile ipotizzare che le aziende che applicano queste strategie tendono a dedicare troppo tempo ai canali online – anche perché necessitano di essere monitorati – e quindi si dimenticano dell'importanza di strumenti offline, come volantini e manifesti. Spostandoci sulle tecnologie digitali per la gestione delle operations, è emersa un'altra differenza fra strutture ricettive e attività ristorative; infatti, le prime sono più propensi ad utilizzare questi strumenti: l'80% delle strutture ricettive ha introdotto almeno una tecnologia contro il 40% delle attività ristorative. Fra le soluzioni più diffuse adottate dalle strutture ricettive ci sono i software di Web analytics, i quali sembrano essere correlati ad una maggiore

percentuale di prenotazioni dirette (+2 punti percentuali) e ad una minore percentuale di quelle tramite OTA (-3 punti percentuali) ed altri portali non-OTA (-3 punti percentuali). Un altro strumento interessante è rappresentato dalla business intelligence analytics; questa soluzione non sembra essere correlata ad una maggiore percentuale di prenotazioni dirette, ma le strutture che lo applicano hanno una migliore aspettativa sui ricavi totali del 2017. È possibile ipotizzare questo strumento possa non essere collegato a maggiori prenotazioni dirette, ma a maggiori ricavi; ad esempio le metodologie di business intelligence possono aiutare nella definizione del prezzo ottimale. Fra gli strumenti meno diffusi troviamo la CRM; questo strumento non sembra essere correlato ad un miglioramento delle prenotazioni dirette, ma l'integrazione con altre soluzioni potrebbe aiutare a migliorare questa performance. L'analisi delle tecnologie digitali ha anche mostrato che le strutture maggiormente legate al business travel tendono ad implementare soluzioni innovative più degli altri. Quindi, è possibile ipotizzare che anche le caratteristiche della clientela di una struttura ricettiva può influenzare l'adozione di nuove tecnologie per la gestione delle operations. Successivamente, l'analisi si è mossa verso le relazioni con gli attori online, che generalmente vengono percepiti positivamente dagli attori dell'ospitalità italiana. Innanzitutto, il 66% delle strutture ricettive considera le OTA un'opportunità ed è possibile ipotizzare che dietro questa positività ci possa essere anche il billboard effect: infatti, il 76% dei rispondenti afferma che le OTA hanno anche migliorato le loro prenotazioni dirette. Inoltre, sembrerebbe che le strutture che affermano che le OTA non migliorano le prenotazioni dirette, fanno uso di un book engine e/o accettano carte prepagate nella prenotazione, meno di chi ha verificato il miglioramento. Quindi è possibile ipotizzare che per sfruttare il billboard effect, essere presenti sulle OTA non è abbastanza, ma è importante avere gli strumenti che permettono di raccogliere prenotazioni facilmente. Gli attori dell'industria dell'ospitalità italiana sembrano essere positivi anche a proposito dei portali di recensione, che sono considerati un'opportunità dal 56% delle strutture ricettive e dal 49% delle attività ristorative. Tuttavia, ci sono anche delle opinioni negative: il 18% delle strutture ricettive considera questi portali un problema, così come il 28% delle attività ristorative; e la maggior parte delle lamentele riguardano la mancanza di controllo sulle recensioni. Tuttavia, sembra che rispondere alle recensioni negative possa aiutare; infatti, coloro che applicano questa pratica sembrano essere più ottimisti sui portali: in questo caso, la percentuale di rispondenti che considera i portali di recensione un'opportunità è più alta di 7 punti percentuali nelle strutture ricettive e di 11 punti percentuali nelle attività ristorative. Oltre ai siti di recensione, gli attori dell'ospitalità possono collezionare recensioni tramite i propri canali (es. social network). Tuttavia, la decisione di raccogliere recensioni tramite sito o social network non esclude i portali esterni: infatti, il 93% delle strutture ricettive che colleziona recensioni sul sito o sui social legge anche recensioni

su portali esterni; e lo stesso vale per il 91% delle attività ristorative che colleziona recensioni sul sito o sui social. Fra le attività ristorative italiane stanno diventando molto popolari anche le/i app/portali che riguardano il cibo: il 52% dei rispondenti è presente in almeno uno di essi ed i più diffusi sembrano essere quelli relativi alla ricerca dei ristoranti con l'aiuto delle recensioni. Le seconde più diffuse sono le/i app/portali per la prenotazione online dei tavoli, che sono considerate un'opportunità dal 27% dei rispondenti e la percentuale sale di 19 punti percentuali se si considerano le attività ristorative che ne fanno uso. Quindi l'ottimismo è alto, anche nonostante al fatto che le attività ristorative che utilizzano queste app, hanno una minore percentuale di prenotazioni dirette. È possibile ipotizzare che i vantaggi forniti dalle/dai app/portali di prenotazione online del tavolo, sono considerati più importanti della maggiore intermediazione che essi possano generare. Le app meno diffuse sono quelle legate al food delivery, che risultano poco note ai rispondenti: infatti, il 19% non sa cosa siano. Tuttavia, questa poca consapevolezza potrebbe essere legata al fatto che i fornitori del servizio (es. Deliveroo, JustEat, ...) si sono sempre concentrati sulle grandi città, senza dare un'attenzione particolare alle province. L'ultima analisi fatta nell'analisi empirica è consistita in confrontare le diverse tipologie di strutture ricettive in termini di canali di prenotazione e di come fanno promozione. È emerso che grazie alle maggiori risorse finanziarie, gli hotel tendono a promuovere i propri canali più degli altri e sembrano preferire le OTA agli altri portali a pagamento, che sono sfruttati da soltanto il 26% degli hotel. Dall'altro lato, bed and breakfast, agriturismi e case vacanza hanno minori risorse finanziarie e quindi, tendono ad avere un approccio differente: infatti, sembra che la maggior parte di loro non dia particolare attenzione alla promozione dei propri canali. L'attività online dei bed and breakfast sembra essere strettamente legata alle OTA e soltanto il 22% è presente su portali non-OTA. Le OTA sono risultate fondamentali anche per l'attività online degli agriturismi; ma queste strutture danno una certa importanza anche ai portali non-OTA, che vengono utilizzati dal 46% di queste strutture e rappresentano di media il 18% delle prenotazioni totali. Se per bed and breakfast e agriturismi le OTA sono fondamentali, per le case vacanza sono "vitali", visto che rappresentano il 52% delle prenotazioni totali.

# Literary review

# PART 1: The hospitality industry

In this first chapter, the context of the Italian hospitality industry, that will be further investigated in the empirical analysis will be presented. The first objective is to give a clear definition of hospitality industry, presenting what are its boundaries, its main businesses and the relationship with the tourism sector. Secondly, the main businesses characterizing it will be investigated; the objective is to understand what are the main actors and how they are related. Then, the analysis moves to the customer side, trying to understand what are the customers of this industry and which strategies can be followed by the providers in order to reach them. Finally, an insight to the Italian situation will be given, in order to better understand the characteristics of the Italian market.

## 1.1-The definition of hospitality industry

The first step to make in the definition of the hospitality industry is the understanding of what hospitality means. According to the website DiscoverHospitality.com<sup>3</sup> hospitality is “the business of helping people to feel welcome and relaxed and to enjoy themselves”. This definition clearly states what are the feelings that the actors of hospitality industry wants to transmit to their customers, but with only this sentence it is not possible understanding what are the products and/or services that this industry provides. The manual “Tourism and Hospitality Studies” (Mackenzie & Chan, 2009) can help to clarify this aspect; it states that hospitality is “the act of kindness in welcoming and looking after the basic needs of customers or strangers, mainly in relation to food, drinks and accommodation”. By this definition, it is possible saying that the main outputs of hospitality industries are: places to stay and food and beverage; so, accommodation facilities and restaurant activities can be considered the two main businesses of this industry. However, it is not only about them, in fact, also part of the recreation activities and events, as well as part of travel and transportation have to be considered (Mackenzie & Chan, 2009). In essence, the hospitality industry is made of: accommodation facilities, restaurant activities and any other additional service which can help people to feel welcomed in a certain place.

Now that the concept of hospitality industry is clarified it could be quite clear that its activities may overlap with the tourism sector, so the question is:

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<sup>3</sup> DiscoverHospitality.com is a website aimed at helping people to find job opportunities in hospitality.

*“Should the Hospitality Industry be included into the Tourism Sector?”*

The two sectors have many points in common; in fact, the purpose of “helping people to feel welcome and relaxed and to enjoy themselves” characterized hospitality as well as tourism. However, although the two sectors share a common purpose the answer to the previous question is “No”. In fact, the hospitality industry serves tourist as well as non-tourists and this becomes clear if for instance we consider transportations: they help tourists in the points of destination to move and make their stay better; however, they are not used only by tourist, but also by other people like commuters. Another example is represented by hospital catering: by definition, it is a restaurant activity (so it is part of the hospitality), but its target are not tourists.

On the other side, it is not possible saying that tourism sector is included into the hospitality industry. In fact, considering the traditional classification of the actors of the tourism system (Della Corte & Sciarelli, 2003), it is possible having the following groups:

- Transportation companies such as airlines, rail transport or ferries
- Accommodation facilities such as hotel and bed and breakfast
- Restaurant activities
- Tour operators
- Travel agencies
- Incoming enterprises
- Enterprises related to specific activity such as fair or other events
- Enterprises related to attractions linked to natural and cultural resources as well as to entertainment

As it can be noticed, this system is made by actors concerning with hospitality, as well as actors such as travel agencies or tour operators that do not directly deal with it.

For all these reasons it is possible concluding that tourism sector and hospitality industry can be described as two ensembles which have manypoints in common but also several elements which are exclusive.

## 1.2-The providers

As it was described in the previous section, hospitality industry is made of several activities like: restaurants, hotels, attractions, transportations and many others. However, the objective of this paper

is not to make an analysis of the whole industry, but to focus on its two main businesses: accommodation facilities and restaurant activities. In this section, a clear definition of these two categories and of the actors that are part of them will be given as well as an analysis about their relationship.

### *1.2.1-Accommodation facilities*

Accommodation facilities can be defined as structures that have the purpose of hosting people for short time horizon. There are different types of accommodation facilities and they can vary according to different criteria: services provided, type of building, way of providing the service and so on.

Taking into consideration the legislative decree n°79 of the 23rd May 2011, we can make a classification of the accommodation facilities in hotel and non-hotel.

Here there are some definitions<sup>4</sup> of the different accommodation facilities:

- Hotel: accommodation facility which offers food and other activities in addition to lodging; generally, the lodging consists in a room located in one or more buildings.
- Motel: hotel accommodation facility which is generally exploited for a very “short-stay” and it is specialized in providing assistance, repair and fuel for people who are travelling by car, truck or other vehicles.
- Residence: hotel accommodation facility similar to hotel, but it offers also accessories that hotels could not do; for instance, residence can provide an apartment with a kitchen inside.
- Bed and Breakfast: accommodation facility which offers only lodging and breakfast. These facilities can be classified as “hotel” if they are managed in an entrepreneurial way or as “non-hotel” when they are not.
- Vacation rental: private house or apartment rented for a short time period. These facilities are classified as non-hotel.
- Hostel: non-hotel accommodation facility managed by not-for-profit associations. Generally, its target are young people and some services are shared among the guests.

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<sup>4</sup> These definitions take into consideration the legislative decree n°79 of the 23 May 2011, but they have been adapted for the translation to the English language; moreover, not all the accommodation facilities have been described, but just the most relevant.

- Camping: non-hotel accommodation facility which provides spaces where customer can put their tent, caravan or camper. In most of the case the customers should own or rent equipment for lodging. However, many camping also own bungalow which can be rent.
- Holiday village: non-hotel accommodation facility very similar to camping, but generally it provides more services and entertainment.
- Lodging facility in rural area: non-hotel accommodation facility which provides lodging and food in a structure which is also used for agricultural or/and farm activities. The Italian word used to refer to these activities is “Agriturismo”.
- Alpin refuge: non-hotel accommodation facility located high in the mountains, in order to provide food and shelter to climbers and hikers. They are generally managed by Alpine Club.

### *1.2.2-Restaurant activities*

The restaurant activities are all the businesses which are related to the production of a meal and to the delivery to the final customer. According to the book “Salabar.it”<sup>5</sup> volume 1, (Galeazzi, 2009) restaurant activities can be classified in three groups:

- Commercial restaurant activities
- Collective restaurant activities
- Catering activities

In the first category it is possible finding all the restaurant activities which deliver food to single final consumers, not organized in a collective way. Within this category we can find: typical restaurants like a “pizzeria” or a “trattoria”, restaurant activities inside accommodation facilities, “fast” restaurant activities, such as fast food or take away and restaurant activities “on board”, which is about the provision of food to people who are travelling (for instance on a cruise).

The second category is made of all the restaurant activities which provides meals to a larger amount of people who need to be served in the same way because they are part of the same group. Examples of these restaurant activities are: hospital catering, scholar catering, restaurant activities inside enterprises, etc...

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<sup>5</sup> Salabar.it is an internet book written by Oscar Galeazzi with the support of the publishing house Hoepli (<http://www.salabar.it/node/198>)

The last category, catering activities, consists in the provision of food by an enterprise that has previously prepared the meal in its building and then brings it to the location of the customer. Generally, who provides catering activities is also responsible for serving food and managing the locations during the meal. In most of the case catering activities could be classified as collective restaurant activities, but it is not always like this; for this reason, these types of activities are considered in a different category.

### *1.2.3-Food tourism*

Now that the different type of actors identifying accommodation facilities and restaurant activities have been clarified, the next step is the understanding of the relationships among them. As showed in section 1.2.1, by definition, some accommodation facilities, like hotels, also provide restaurant activities; however, the relationship among these businesses is not only about that and it is important considering the complementarity of the tourism offering: when a tourist decides the point of destinations of its vacation, he/she also has to think about where to stay (lodging) and where to eat (food and beverage). As a confirm of this: according to a survey carried out by the Observatory Digital Innovation in Tourism in 2017, restaurant activities represent the most diffused activities booked by tourists (Osservatorio Innovazione Digitale nel Turismo of the School of Management of Politecnico di Milano, 2017).

The complementarity between accommodation facilities and restaurant activities can be seen under two different perspectives. The first one considers accommodation facilities as a driver for restaurant activities: tourists decide the point of destination and where to lodge, then, in order to satisfy their basic needs (hunger and thirst), they also need to decide where to eat during the vacation. On the other side, the second perspective considers the opposite situation: people, attracted by the possibility of tasting new food, in rural facilities as well as in other “typical” restaurant activities decide to go and visit a certain place, where they will need accommodation.

The phenomenon associated to the second perspective is called “Food tourism” and it can be defined as the visitation to primary and secondary food producers, food festivals, restaurants and specific locations for which food tasting and/or experiencing the attributes of specialist food production regions are the primary motivating factors for travel (Hall, 2006). There are several researches about this topic which identify food tourism as a growing trend. According to a study of the 2013, made by the Mandala Research firm (Mandala Research, 2013), the American leisure travellers (about 170 million people), who has travelled to learn and enjoy dining experiences has grown from 40% to 51%

between 2006 and 2013. Moreover, the study states that 77% of those leisure travellers can be classified as culinary travellers, meaning that they have participated in culinary travel activities, take cooking lessons or attend food festivals (Mandala Research, 2013). In addition, the University of Florida's report "A Flash of Culinary Tourism" (Norman, Liu, & Pennington-Gray, 2013) estimates that in 2012, 39 million U.S. leisure travellers chose a destination based on the availability of culinary activities, while another 35 million looks for culinary activities after a destination is decided. These studies are about United States, however the Food Tourism is a growing trend worldwide; in fact, according to a survey made by the World Touring Organization (UNWTO, 2012) involving its Affiliate Members in 2012, 88.2% of respondents consider gastronomy a defining element of the brand image of travel destination. An example of the importance of this trend is represented by the startup Foody, presented for the first time on December 2006 during the startup contest of BTO<sup>6</sup>. The website of Foody<sup>7</sup> consists in a platform which can help travellers to organise, book and live culinary experiences.

However, there are also situations where food has an opposite effect on the tourist choice and the possibility of tasting new foods does not represent a driver for travelling. In "An analysis of the travel motivation of tourists from the People's Republic of China" (Lau, 2006) it is stated that Chinese tourists are more likely to hold in their own country or at least to remain in Asia because of their food preferences. However, accommodation facilities as well as restaurant activities should be able to find opportunities also in these situations; for example, the New York's Hotel Plaza Athénée has introduced services geared toward the Chinese segment and the introduction of a Chinese breakfast is part of this strategy<sup>8</sup>.

Finally, accommodation facilities and restaurant activities are very linked one to each other and although traditionally, in the tourism sector, restaurant activities have always been seen as a support to accommodation facilities, this scenario is changing and also restaurant activities can become a strong driver in the tourist decision. In essence, each business can take advantages from the other.

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<sup>6</sup> Palladino D. (2017) Si presenta al mercato Foody, piattaforma di turismo esperienziale enogastronomico. Webitmag

<sup>7</sup> [www.foodyexperience.com](http://www.foodyexperience.com)

<sup>8</sup> Fabricant F. (2012) Brakfasts That Reflect New Guests. The New York Times

## 1.3-Customers' classification

At this point, it should be clear what hospitality industry is, what are its boundaries and who are the providers; the next step is the understanding of the customers characterizing this industry. The customers of hospitality industry can be classified in two different groups, each of them with its own characteristics and needs; the two groups are: “leisure” and “business”. The former includes all the people that “move” for pleasure and for this reason, their decision of travelling is mainly driven by their own desire. On the other side, the latter segment includes all the people who have to move for work; so, basically their decision of travelling is driven by the needs of the enterprise they are working for. As Vito D’Amico, CEO and Founder of SICANIASC hospitality<sup>9</sup>, wrote on AboutHotel.it<sup>10</sup>, because of these characteristics, the leisure segment is potentially infinite, while on the other side the number of travels made for work are limited<sup>11</sup>. Vito D’Amico also highlighted three main differences in the two segments:

1. The fair: in the business segment there is a lower sensibility to prices and in general it is possible the creation of agreement with the providers. On the other side, leisure customers give higher importance to price and do not have such agreements.
2. The flexibility: the business segment does not have high flexibility on the dates, since their travel is not related to their willingness, but to the needs of their company; while leisure customers, although they can present some limits, are characterized by more freedom.
3. The periods: the two segments present completely different trend in the period chosen for travel. While the travels of leisure customers generally take place during week end and in holidays periods, business travellers tend to travel all over the year, except during week end and holidays periods.

About these differences, there are several discussions about how the actors of hospitality, especially hotels, should reach their customers: *should they focus on both the segments or only one of them?* If we consider that the periods when leisure segment tends to travel correspond to the periods when business travellers do not move, it could appear that the best solution is to achieve both of them, but

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<sup>9</sup> Company that offers software solutions and services aimed at improving the performances of hotels (<http://www.sicaniasc.it/it/index.html>)

<sup>10</sup> Online media dedicated to the world of hoteliers (<http://www.abouthotel.it/>)

<sup>11</sup> [http://www.abouthotel.it/notizie/4782/business\\_e\\_leisure\\_dipende\\_tutto\\_da\\_questa\\_differenza\\_la\\_segmentazione](http://www.abouthotel.it/notizie/4782/business_e_leisure_dipende_tutto_da_questa_differenza_la_segmentazione)

it is not that easy. In fact, the two segments presents different needs – business travel could need wi-fi connection to keep in touch with colleagues and send emails, while leisure customer would prefer to have equipment, like bicycles, to move and see new places – and it could be hard to reach all their necessities; for this reason some facilities decided to focus on only one of them, accepting the pros and the cons of this choice.

The main advantages of the business segment are that a facility can exploit agreements with companies and the fact that in this segment there is less sensibility to price. Moreover, these types of facilities could increase their profitability by better exploiting their assets and not only focusing on the rooms revenues; function room hire, meetings and events, groups business and sales and catering are all potential revenues streams (Tnooz, 2017). On the other side, the main advantage that facilities can gain from the leisure segment is that it is potentially infinite and so it can be less competitive; however, in this segment it is more complex to understand the characteristics and the needs of the customer because some people travel looking for new activities, some other for relax, some for tasting new foods and so on. In essence, facilities focusing only on leisure customers, would better make a segmentation of their customers in order to better understand what are exactly their needs. The following table summarize the pros and the cons of each strategy (Table 1):

	<b>Strategy focused on leisure segment</b>	<b>Strategy focused on business segment</b>	<b>Strategy focused on both the segment</b>
<b>PROS</b>	-Possibility to exploit an infinite market -Lower competition	-Leverage on agreements with companies -Less sensibility to price -More opportunities for better exploiting the assets	-Possibility to reduce demand variability -Capture value from all the segments
<b>CONS</b>	-Need to segment to better understand the demand -Demand variability	-A finite market -High competition -Lost opportunities in leisure segment -Demand variability	-Increase in the management complexity

	-Lost opportunities in business segment -More sensibility to price (in general)		
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Table 1: different types of strategies in hospitality industries

However, the hospitality industry should also take into consideration a new trend which is characterizing the business segment and making it closer to the leisure one: “*The bleisure travel*”. According to a 2016 report of the Carlson Wagonlit Travel (CWT Solution Group, 2016) the bleisure travel, also called “bizcation” is the extension of personal purpose to business trip for different type of reasons: discovering a new city, visiting friends or family, looking to relax or seeking to entertainment. As a witness of the growth of this “new” business traveller, a 2016 report of Travel Weekly (Travel Weekly, 2016) stated that the percentage of leisure trips that have a business component in 2016 jumped to 17 percent, up from 11 percent in 2012 and 14 percent in 2015. Moreover, in 2016 Booking.com stated that 49% of business travellers in 2016 has extended their business trips to further enjoy the destination, while three quarters (75%) intend to do so the same or more in 2017<sup>12</sup>.

Finally, it is very important for an actor of the hospitality industry deciding on which segment put higher attention; this choice should consider all the opportunities that a segment can generate according to what are the characteristics of the facility and of the territory - some territories could not be interesting for leisure travellers, as well as some others do not represent a destination for business travels - without forgetting that the gap between leisure and business is reducing.

## 1.4-The Italian hospitality industry

In the final section of this chapter, an insight to the Italian accommodation facilities and restaurant activities will be presented, but before this it is important making some considerations about their importance.

As the main part of the hospitality industry, accommodation facilities and restaurant activities are responsible for the quality of the journey in the point of destination and so are directly linked to the potential decision of travellers to “come back” and to the attractiveness of a geographical area. So,

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<sup>12</sup> 8 Big Travel Predictions for 2017 (2016, 21 november) available on <https://globalnews.booking.com/8-big-travel-predictions-for-2017/>

the performances of these businesses can have a strong impact on one of the main Italian industry: the travel and tourism industry; in fact, in 2016 this industry had an economic direct impact and an economic indirect impact respectively around 77.3 and 186.1 billion of euros, representing the 11.1% of the national GDP (World Travel and Tourism Council, 2017).

Moreover, according to a study carried out by Sociometrica in collaboration with Expert System involving 218.000 conversations on social media made by tourists after a vacation in Italy, Italian accommodation facilities and restaurant activities have high approval rating (Sociometrica, 2014). Going more in depth about this study, restaurants were the most appreciated element of the journey and the terms mostly used to talk about them were: “good”, “great”, “nice”, “enjoy” and “beautiful”; also hotels are in the top of the most enjoyed elements (they got the third score) and the terms used to talk about them were: “wonderful”, “beautiful” and “love”.

### *1.4.1-Italian accommodation facilities<sup>13</sup>*

Considering data coming from the database of ISTAT about the year 2016, the total number of accommodation facilities in ITALY was 252’402 and the Table 2 summarized their distribution according to the definitions presented in Section 1.2.1.

	Number of facilities	Percentage on total number of facilities
<b>HOTEL</b>	33,192	13%
Hotel	30,377	12%
Residence	2’815	1%
<b>NON-HOTEL</b>	219,210	86%
Bed and Breakfast <sup>14</sup>	30,354	12%
Camping and Holiday Village	2,708	1%
Vacation Rental	160,117	64%
Lodging facility in rural area	18,528	7%
Hostel	592	0%
Other	6,911	3%

*Table 2: Italian accommodation facilities in 2016*

As it can be noticed, non-hotel facilities are more numerous, but it is important considering that this type of facilities generally has lower capacity respect to hotels; in fact, comparing the number of beds,

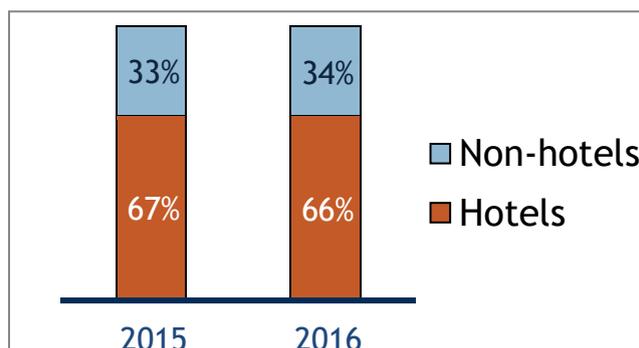
<sup>13</sup> All the data presented in this part are partially an elaboration of data coming from ISTAT database (<http://www.istat.it/>) and partially taken from a 2017 report of ISTAT (ISTAT, 2017)

<sup>14</sup> In this table all the Bed and Breakfast activities are considered as non-hotel

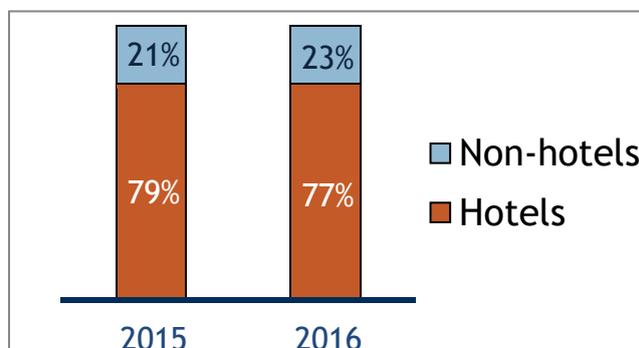
the hotel facilities represents the 43% of the overall offering with 133.7 beds/facility against the 26.6 value of non-hotels.

Now, let us have a look to the demand side. In 2016 the accommodation facilities were characterized by around 116.9 million of arrivals and around 403 million presences, with an average stay about 3.45 nights/customer. However, there are strong differences among hotel and non-hotel facilities. The formers represent the 77% of the arrivals and the 66% of the presences; this difference between arrivals and presences is due to the fact that, although hotel facilities have higher capacity and so more arrivals, people in non-hotel facilities make their stay longer: 5.07 nights/customer against the value of 2.97 of hotels.

Respect to the 2015 the number of arrivals has increased of 3.1%; the presences have grown too, but with lower pace (+2.6%), because of a slight decrease in the duration of the journey: in 2015 the average stay was 3.46 night/customer while in 2016 it was 3.45 night/customer. The following graphs present how the components of hotel and non-hotel has changed in the number of presences and in the arrivals (Graph 1 and Graph 2).



*Graph 1: comparison in the presences of 2016*



*Graph 2: comparison in the arrivals of 2016*

As it can be noticed the Italian non-hotels market is growing and in particular it has assessed an increase of 9.5% in the arrivals and of 4.2% in the presences.

For what concerns the domestic demand, from 2015 the arrivals have increased of 3.1% and the presences of 1.6% without any particular difference between non-hotel and hotel facilities. Moreover, also the non-domestic tourism is growing and with a bigger pace; arrivals have increased of 3.1%, while the presences of 3.5%. This growth is mainly driven by non-hotels facilities which register a 7.2% growth in the demand from foreign tourists. The component of domestic tourists in 2016 represented the 51% of the total travels both in terms of presences and arrivals.

Finally, it is estimated that in 2016, the 86% of travels were for pleasure, and they have increased of 19.6% in terms of arrivals respect to 2015 (+3.0% if we consider presences); on the other side, the remaining 14% are business travels. These types of travels assess a decrease of 4% in terms of arrivals and of 3.2% in terms of presences.

#### *1.4.2-Restaurant activities<sup>15</sup>*

Considering the 2016 report of FIPE<sup>16</sup>, about the year 2015, the total number of restaurant activities in Italy was 325,090; the Table 3 summarized data about the different categories:

Restaurants and mobile food services	172,688	53%
Catering activities	3,066	1%
Bar and other services without kitchen	149,336	46%
TOTAL	325,090	100%

*Table 3: Italian restaurant activities in 2015*

Moreover, it is possible going more in depth in this subdivision. The restaurant and mobile food services is made of: 64.3% restaurants with services, 20.1% restaurants with only take away, 11% pastry shops and ice-creams shop and 4.5% others. Catering activities can be split in catering for

<sup>15</sup> All the data presented in this part are partially an elaboration and partially a presentation of the data of two FIPE reports about restaurant activities (FIPE, 2015) (FIPE, 2016)

<sup>16</sup> Federazione Italiana Pubblici Esercizi: association leader in the Italian restaurant activities market and member of CONFCOMMERCIO. (<http://www.fipe.it/>)

events, which represent the 35.9% and catering activities working 'continuously' according to a contract, which represent the 64.1%.

Let us now consider the demand side. In 2015 the Italian families has expended in food and drinks about 221 billion of euros and 76.4 of them (34.6% of the total) are about restaurant activities. The Italian food consumers can be classified in three groups:

- Heavy consumers: people having 4-5 meals per weeks out of home.
- Average consumers: people having 2-3 meals per week out of home.
- Low consumer: people having 2-3 meals per month out of home.

According to the data of 2015, the heavy consumers were 13 million people, mainly men (53.9%) and 35-44 years old (23.7%); average consumers were 9 million people, mainly men (51.7%); and low consumers were 17 million people, mainly women (54.8%) and over 65 years old.

Of course, these data are referred only to Italian families, and considering that also tourists contribute to the market of food consumed out-of-home, it is clear that this market is very relevant for the Italian economy.

## PART 2: The advent of digital revolution

The previous part of the literary review was aimed at presenting the different actors of the hospitality industry, the dynamic and some interesting trends of the environment and an insight to the Italian market. Now that these points are clear, the next step is to show how this environment has been impacted by the Digital Revolution, also called the Third Industrial Revolution.

The term Digital Revolution is referred to the wide expansion that has seen as protagonists the digital products and all the social, economic and politic changes that has arisen with the digitization of media<sup>17</sup>. One of the main product of the Digital Revolution is represented by Internet, which can be considered a very powerful media. In fact, it is important pointing out its rapid rise: in 1995 the advertising revenues on Internet accounted for 43 million of dollars, while in 2000 the value rises to 4 billion of dollars<sup>18</sup>; in the history of advertising no other media was able to have such a rapid growth (Wind & Mahajan, 2002).

However, the Web – subpart of the Internet - is not only advertising and communication; it is true, the Digital Revolution has incentive companies to bring part of their activities online, but there are also companies that have arisen from the Web, the so-called “Internet company”, like Amazon<sup>19</sup>, the leader of online retailing or Netflix<sup>20</sup>, the portal for online streaming. Of course, the rise of these “new” companies creates tension with the “traditional” actors, because the formers may completely disrupt the markets, thanks to the rapid adoption of new solutions by the customers.

So, it is possible stating that the main elements emerging from the Digital Revolution are:

- New online media
- New digital technologies for the management of operations
- New actors rising from the online environment (i.e. Internet companies)

At this point is important making the question: *“Is the hospitality industry impacted by the Digital Revolution?”*.

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<sup>17</sup> Scialò L. (2016) Rivoluzione digitale: cosa significa e situazione in Italia. Webeconomia.it

<sup>18</sup> Data taken from the reports of the Internet Advertising Bureau (<https://www.iab.com/>) and reported in the book “Digital Marketing” of Jerry Wind and Vijay Mahajan (Wind & Mahajan, 2002)

<sup>19</sup><https://www.amazon.com/>

<sup>20</sup><https://www.netflix.com/browse>

Without any doubt, the answer is “Yes”. As it was previously underlined, the Revolution has affected the whole society and inside the society there are also the customers of the hospitality; so, the providers had to adapt to this change. As a support of this, it should be considered that online transactions are becoming more and more relevant and it is possible seeing this also in the hospitality. Considering the Italian scenario, according to the data elaborated by the Observatory Digital Innovation in Tourism of the School of Management of Politecnico di Milano (Osservatorio Innovazione Digitale nel Turismo of the School of Management of Politecnico di Milano, 2017), the market made of travel packages, transportations and accommodation facilities is estimated around 55.3 billion of euros. The 20% of this value (11.2 billion of euros) comes from digital channels and from Figure 1 it is possible seeing how it has evolved over time.

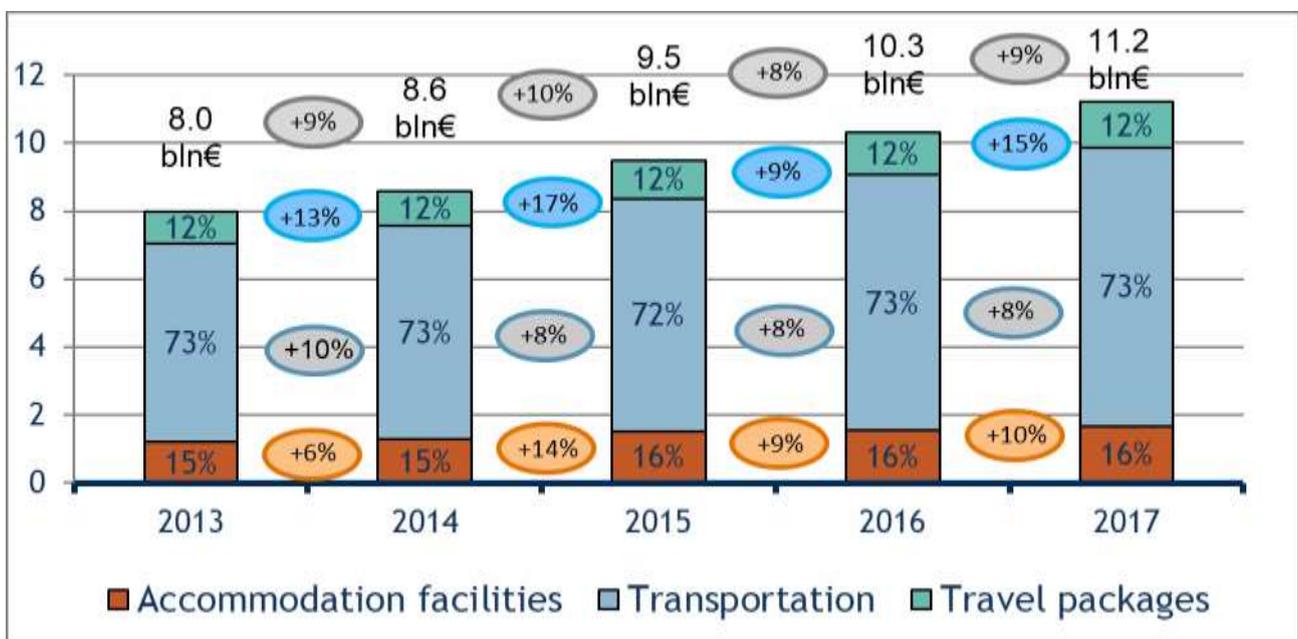


Figure 1: evolution of the digital tourism market<sup>21</sup>

It is noticeable that the market is continuously growing and mainly with a pace around +9% per year; most of the value of online transactions involves transportations, but the 15% (1.68 billion of euros in 2017) are about accommodation facilities, that - like all the other markets - keep on growing.

In the next chapters, the objective will be to understand how the hospitality industry is changing and how it can adapt to the context generated by the Digital Revolution.

<sup>21</sup> Observatory Digital Innovation in Tourism of the School of Management of Politecnico di Milano

## The management of owned online channels

As previously stated, one of the main characteristics of the Digital Revolution is that it provided new tools for communicating, like mobile phone, emails, website and social networks; and companies can exploit them – especially website and social networks - for promoting their business. Focusing on website and social network accounts and considering the hospitality industry, the roles of these channels can be of providing the potential customers with useful information about the enterprise (informational role), but they can also represent additional channels for booking (booking role).

Starting with the informational role, the actors of the hospitality can exploit the new online channels for making storytelling, which is not simply inform about the business, but something more: it can be defined as the narration of a story that is able to generate feelings, present the characteristics of the product and create the desire for it<sup>22</sup>. Storytelling is important in tourism – and thus, also in hospitality industry – because generally, tourism is associated with experiences and the audience is constantly looking for authentic stories<sup>23</sup>. The idea at the fundamentals of using storytelling in hospitality, is that the providers should not present their company as a “data sheet” but tell the story behind it. Moreover, it is important considering that storytelling can be supported by images and videos (the so-called “visual storytelling”), which can be constantly upload on social network accounts, to try to engage people. For what concerns the booking role, the actors of hospitality can implement a book engine on their website; this way, the process of bookings can be improved in terms of time, for both the customer and the provider. Of course, on social network it is not possible having a book engine, but the providers can still accept bookings from social network and inform customers about this possibility.

Anyway, storytelling and book engine are useless if a company does not have traffic and thus, an audience; so, it is also important generating traffic towards online channels, otherwise nobody will see their contents and functionalities. For promoting owned online channels there are several ways and techniques and one of them is called Search Engine Marketing (SEM), which is the ensemble of

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<sup>22</sup> Definition that takes inspiration from a Gianluca Fiscato’s article: Fiscato G. (2012) Cos’è lo story telling? Sette punti per comprenderlo. Fourmarketing.com

<sup>23</sup> Marelli S. (2017) Turismo esperienziale: lo storytelling nel settore turistico. WAM

measures that are designed to better position a website in the search results and in doing so direct visitors to the website<sup>24</sup>. The SEM activities can be split in two parts:

- Search Engine Optimisation (SEO): the group of techniques and strategies that allow a website to be found by the users of search engine in the results (not under payment) during the Zero Moment of True, which is the moment when users are looking for information about contents, products or services<sup>25</sup>.
- Search Engine Advertising (SEA): form of advertising consisting in creating text contents or banners that are displayed on the search engines and on websites of their partners.

It is possible stating that the main difference between SEO and SEA is that the former is for free, although generally is made with the support of a consultant. Furthermore, the two methodologies have some differences in the creation of traffics: SEA allows to generate traffic in less time, but only on the short term; while SEO is able to achieve long term optimisation results<sup>26</sup>.

Anyway, the actors of hospitality should not only focus on the website, but also consider the importance of social networks. A study<sup>27</sup> of Internet Marketing Inc.<sup>28</sup> reported the followings conclusions:

- 52% of people involved in the study affirms that they have took inspiration for the planning of a travel from photos of friends.
- 76% of respondents affirms to have shared the photos of the travels on social networks.

Also an investigation reported in 2014 of Google in collaboration with Ipsos MediaCT, confirm this relationship between the tourist customer journey and social media, stating that 83% of leisure travellers worldwide use social network and video and/or photo sites as a source for inspiration (Google/Ipsos MediaCT, 2014). Moreover, it is not only a matter of inspiration: according to a research made by Volagratis about 2017 summer, 76% of Italian travellers use Facebook during their

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<sup>24</sup> <https://www.searchmetrics.com/glossary/search-engine-marketing/>

<sup>25</sup> Perini R. (2013) Che cos'è la SEO. Riccardoperini.com

<sup>26</sup> <http://www.sestosensocom.it/sea-o-seo-quali-sono-le-differenze-e-quale-scegliere/>

<sup>27</sup> Gray B. (2015) The Importance of Social Media for Travel Brands. Internetmarketinginc.com

<sup>28</sup> digital marketing agency specializing in SEO, PPC, Social Media, Web Design, Email Marketing, Display, and Analytics

vacation<sup>29</sup>. So, as the customer is often connected to social networks during the customer journey, also the providers should be there in order to intercept his/her needs. To manage social network accounts properly, only being present is not enough; these channels should be constantly monitored. According to Ninjamarketing.it, over 50% of users that contact a brand on Twitter expects an answer from it and the percentage rises to 75% when it is about a complaint<sup>30</sup>. Moreover, like for the website, making advertising on social network may increase the visibility of a company.

Finally, it seems that the Digital Revolution has given the possibility to the actors of hospitality to have new digital owned channels, useful for getting in contact with customers; anyway, it should be important considering that there are several solutions that may be exploited to improve the visibility and the management of these channels.

## Management of the operations

The Digital revolution has provided the actors of hospitality with digital technologies that may support the management of their operations, improving the performances of service level, costs and profits. Among the different solutions, it is possible considering those that are related to the acceptance of payments; these include the more traditional ePOS, but also more innovative solutions like the acceptance of electronic meal vouchers. In addition, also the recent trend of mobile payments should not be neglected: in 2015 the worldwide mobile payment revenue was around 450 billion of US dollars and it is estimated to reach the value of over one billion in 2019<sup>31</sup>.

Let us now move to solutions more related to accommodation facilities. Some of the instruments that can be exploited are: systems for the integration with OTAs and GDS, but also a Property Management System (PMS) for managing the rooms, the check in and the check out, as well as a software for accounting. Moreover, it is possible stating that one of the future trends for accommodation facilities – probably more related to hotels – is the automation of the activities<sup>32</sup>. For instance, it could be possible for the customers to use their smartphones for all the in-room entertainment (TV, DVD, ...) and pay for the in-room services<sup>33</sup>. An example of a very innovative

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<sup>29</sup> Fotia F. (2017) Gli italiani in vacanza? I più reperibili per lavoro e i più attivi sui social network. MeteoWeb

<sup>30</sup> Nardon M. (2017) Social Media e Google per il Marketing del Turismo. Ninja Marketing

<sup>31</sup> Source: Statista

<sup>32</sup> Le nuove tecnologie nell'hotellerie in 10 trend (2013, 1 July) available on <https://www.hospitalitynews.it/le-nuove-tecnologie-nellhotellerie-in-10-trend/>

<sup>33</sup> Norman H. (2018) The Future of Hospitality: PMS and the Rise of New Technologies. Hospitality Net

hotel is represented by the KViHotel<sup>34</sup>, in Budapest, the first hotel completely managed through smartphones<sup>35</sup>. Thanks to the app TMRW Hotels, the customers can use the smartphone for booking a room, making the check-in, and for many other services; the app is also used by the personnel to organise the activities<sup>36</sup>.

For restaurant activities, some of the digital solutions are represented by apps or software on devices that allow the waiter/waitress to take the order, as well as software for the management of purchase, suppliers, tables and employees or also software for managing online reservations. Furthermore, according to WiSpot, the hotspot wi-fi system distributed by Ikalia<sup>37</sup>, 5 useful solutions for restaurant activities, which may become popular in the future will be<sup>38</sup>:

- Mobile ordering: if customers order via app, the process is simplified and the probability of making mistakes in the order is reduced.
- Touch points for ordering through iPad: this solution avoid the creation of queue, since the customer makes to order and then go to the table.
- Ordering via Facebook: a solution driven by the fact that many restaurant activities have an account on Facebook, as well as many people have it too.
- High tech tables: the table allow to order and pay the bill, but also entertain, since it can be provided with games.
- Digital online coupon: it is possible showing banner with promotion and discounts created for the users of the wi fi of the location. It is useful for fostering particular products and up-selling initiatives.

Moreover, there are also technology solutions that can support hospitality industry actors in several fields, thanks to the collection and elaboration of data. An example of an approach data-driven, is

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<sup>34</sup> <https://www.kvihotelbudapest.com/>

<sup>35</sup> In Ungheria è nato il primo hotel digitale d'Europa (2018, 22 march) available on <http://www.stile.it/2018/03/22/ungheria-primo-hotel-digitale-europa-id-182575/>

<sup>36</sup> In Ungheria è nato il primo hotel digitale d'Europa (2018, 22 march) available on <http://www.stile.it/2018/03/22/ungheria-primo-hotel-digitale-europa-id-182575/>

<sup>37</sup> <http://ikalialia.it/>

<sup>38</sup> 5 Innovative Tecnologie Per Ristoranti Che Piacciono Ai Clienti (2016, 14 july) available on <https://www.wispot.it/blog/tecnologie-per-ristoranti-piacciono-clienti/>

represented by the American restaurants chain Cava Mezze<sup>39</sup> that uses data and sensors in some selected restaurants, for the following purposes<sup>40</sup>:

- Avoid long queues: sensors positioned where the customers wait for the orders showed that lines tended to bunch up near the menu board and while people are selecting ingredients at the serving station. The conclusion of the company was that the menu was too rich and customers could not decide; so, limiting the choice of customers the restaurants were able to reduce queue of 10% and hold 12% more people.
- Better management of seats: sensors in the restaurants' seating areas showed that customers in urban locations often stay only long enough to eat, but in the suburbs they prefer to linger; so, the company decided to increase the capacity in suburbs restaurants.
- Improve back-of-house operations: Cava Mezze focused also on the data concerning with the kitchen, for instance monitoring how much time refrigerator was kept open, or if there are temperature or humidity spikes. Thanks to the attention of several variables, the company affirms that food-quality complains have reduced.

The Cava Mezze examples have shown how much data can be supportive in improving the service level – and also revenues - but “*Which kind of data a company of the hospitality should use?*”.

Starting from a wider perspective, it is possible considering Big Data, which can be matched with Business Intelligence methodologies in order to better understand the external environment. Just to give few examples for hospitality industry: knowing data about transportations can make a company better understands the demand and its peaks, but also data about exchanges rate can be supportive in this as well as weather conditions<sup>41</sup>. Nevertheless, for an actor of hospitality also Small Data can be supportive and maybe even more effective than the “big” ones, because they allow to go more in depth<sup>42</sup>. In hospitality, Small Data can be seen as data owned by a company, involving the history of bookings, traffic on the website, the reviews collected and any others<sup>43</sup>. Basically, CRM software and Web analytics software can represent a source of Small Data and the information elaborated from them can be used for generating promotions and improving loyalty programs. This last element should

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<sup>39</sup> <http://www.cavamezze.com/>

<sup>40</sup> Paynter B. (2017) Cava Uses Data to Redesign Restaurants. Fast Company

<sup>41</sup> Soler M. (2016) Why Hotels Need Big Data. Snapshot

<sup>42</sup> Milano R. (2017) Turismo 4.0: come sfruttare i Big Data per una nuova esperienza di viaggio. Agenda Digitale

<sup>43</sup> [http://www.abouthotel.it/notizie/5617/in\\_hotel\\_il\\_valore\\_degli\\_small\\_data](http://www.abouthotel.it/notizie/5617/in_hotel_il_valore_degli_small_data)

not be underrated, since some hotel chains are trying to improve their rewards program for gain customers loyalty; like Marriott Hotels and Resorts, that has extended its program involving online retailers like Amazon and Apple<sup>44</sup>. It should be considered that also Small Data about past guests can be used as input for business intelligence methodologies and an example of this comes from the Peabody Hotel in Memphis<sup>45</sup>. The hotel is using business intelligence to figure out which guests indicate they will never stay again and dig even further to understand the why (Korte, Ariyachandra, & Frolick, 2013).

Finally, the Digital Revolution has provided several technology solutions, and it is important for an actor of the hospitality to understand what are the most suitable for its business. Of course, the attitude towards different technologies depend on the financial resources of a company: for instance, the solutions implemented by Cava Mezze are not economical sustainable for a small independent restaurant. The choice of the technologies also depends on the type of business, since some solutions like the building automation systems does not seem so suitable – and useful - for non-hotel facilities. Furthermore, the choice also depends on the company objectives; for instance, if an accommodation facility wants to improve its online channels, it can be useful to use Web analytics solutions to find out which strategies can be more effective.

## Online actors

As it was stated at the beginning of this second part of the literary review, the Digital Revolution has also given the birth to Internet companies. These companies have impacted several industries, creating tension with the “traditional” actors, and the hospitality industry is not excluded. The objective of this chapter is to present the different online actors that have changed – and are still changing – the hospitality industry, trying to understand which benefits they can give to the sector, but also which threats.

### *OTAs and metasearch*

The first online actors presented are metasearch and OTAs. These actors will be treated together since they are both aimed at improving the visibility of accommodation facilities and work in a similar way. A metasearch engine can be defined as a price comparison website that compares hotel rates – but not only hotel - from across the Internet (Triptease, 2017). Basically, metasearch offers a facility

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<sup>44</sup> Martin G. (2017) Marriott Rewards Debuts Tool to Preload Points Balances When Shopping at Retail Sites. Skift

<sup>45</sup> <http://www.peabodymemphis.com/>

visibility, thanks to which a company can generate traffic on its website and, depending on the sites, the company will pay on a CPA (cost per acquisition) or CPC (cost per click) basis (Triptease, 2017). On the other side, an OTA works in much the same way as a traditional travel agent; the users of an OTA can search for room availability, based on geographical location and the dates of their intended stay and the portal will display available solution (VisitEngland, 2014). Basically, the main difference is that while a metasearch only displays the results of a research and then the user will go to the facilities' website, an OTA also allows to make the final booking (i.e. it make the booking phase "shorter"). OTAs can follow two different business models<sup>46</sup>:

- Merchant Model: in this model, hotels (or other facilities) sell rooms to OTAs in bulk at discounted or wholesale prices. The OTAs then sell them to customer at a mark-up price. This is the most commonly used model.
- Agency model: this is a commission-based model wherein hotels give commissions based on business bought. In this model, the hotels list their services, and the OTA do not have to buy anything upfront. This gives the freedom to hotels to price their rooms as per the demand scenario.

It is possible stating that the worldwide market of metasearch and OTAs is dominated by two groups: Booking Holdings<sup>47</sup> (previously called Priceline Group) and Expedia Group<sup>48</sup>. The former includes the OTAs Booking.com and Agoda, the metasearch Kayak and other travel brands like Rentalcars.com. The brands of Expedia groups include the OTAs Expedia, Hotels.com and HomeAway (OTA for rental vacations), the metasearch Trivago and other travel brands.

The relationship between the hospitality industry and these actors is quite controversial, because both metasearch and OTAs have some pros and some cons. Considering metasearch, their main advantage is that from the portal, the customer is sent to the site of the facility; thus, at the end the booking is direct and there is no commission on the reservation. Thanks to the fact that metasearch represents a source for direct bookings, they can be considered as an important instrument for advertising; let just think that since the fourth quarter of 2016, metasearch has grown to become the most important

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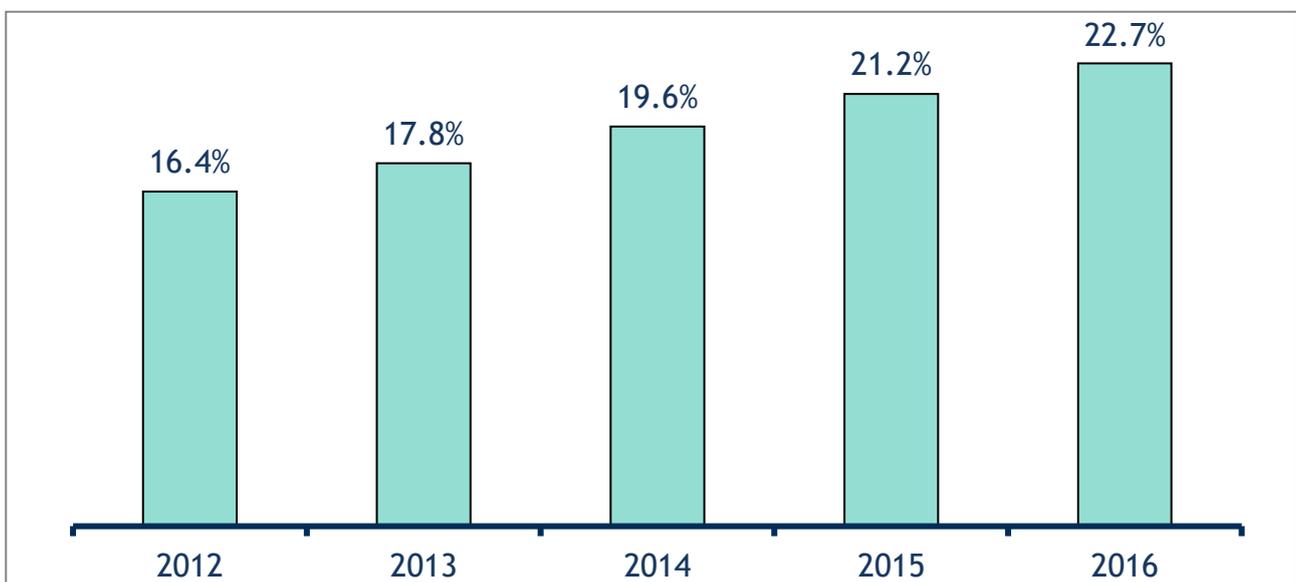
<sup>46</sup> Schmidt (2015) What Business Model does Expedia Follow?. Market Realist

<sup>47</sup> <https://www.bookingholdings.com/>

<sup>48</sup> <http://www.expediagroup.com/>

advertising channel for hotels<sup>49</sup>, outpacing even AdWords<sup>50</sup>. Anyway, metasearch does not give the guarantee of booking: let us consider to be in a CPC logic, if a user comes to the website of an hotel through metasearch and he/she does not book, the facility will still have to pay for the “click”.

On the other side, OTAs, in addition to the visibility, also give the guarantee of the booking: if a customer does not book through the OTA, the accommodation facility does not have to pay any commission. Of course, this way the booking is indirect, and so there is a commission to pay on the transaction. Anyway, over time, the share of hotel booking revenues made through OTAs kept on increasing, as shown by the European data in Figure 1; and so, some accommodation facilities feel like they were losing opportunities.



*Graph 3: European share of gross hotel booking revenue through OTAs<sup>51</sup>*

As stated by Patrick Whyte: after giving away much of their business to online travel agents such as Booking.com and Expedia, it is perhaps understandable that they (hotels) want to reduce what are now substantial distribution costs by bringing more traffic in house<sup>52</sup>. For this reason, some hotel brands have started to invest in promoting direct channels. For example, Marriott International Inc. on April 2016, has introduced a new rate to reward loyalty members who book directly on

<sup>49</sup> Boss J. (2017) Metasearch: the winning approach to direct bookings. FASTBOOKING

<sup>50</sup> Source: a FASTBOOKING analysis on a panel of over 1,000 independent Hoteliers and Hotel groups based in Europe and Asia.

<sup>51</sup> Source: Statista

<sup>52</sup> Whyte P. (2017) The Direct Booking War Is a Myth, at Least in Europe. Skift

Marriott.com, on the app of the company, on the call centers or through selected corporate travel professionals<sup>53</sup>.

Furthermore, accommodation facilities can face some problems in the relationship with OTAs, like the following:

- Booking cancellation: the problem of people cancelling reservations has always affected hospitality industry, but according to Mirai, a Spanish company working in digital marketing for hotels, OTAs have incentive this issue<sup>54</sup>. A research made by Mirai monitored the cancellations (in % on room nights) for four months (January-April 2016) and the results showed that on average the direct bookings have a cancellation rate of 19% against the 39% of those coming from Booking.com<sup>55</sup>. Probably, the promotions and the discounted carried out by OTAs, incentive so much the customer to purchase that he/she makes the bookings also if he/she is not so sure about his/her availability. Moreover, customers can be driven to book in advance – also being unsure – because some OTA’s portals offer flexible cancellation policy.
- Allotment: it consists in defining a certain number of rooms that an OTA (or in general every travel agency) can sell. So, if the hotel fixed an allotment of 3 rooms with an OTA, when the portal will sell the 3 rooms, it – the portal - will not show the facility on its website anymore. Basically, the allotment itself is not an issue, but it is important considering that it may create problem of overbooking; in fact, an hotel could also sell the rooms in allotment.
- Parity rate: it is a policy that obliges an accommodation facility to present the same prices in all the different online channels (website included). So, a company cannot promote a better price on its website to have more bookings. Anyway, in some country this policy has been banned.
- Lack of communication: a number of OTAs do not share guest details with hoteliers<sup>56</sup>.

Beside these problems concerning with the direct relationship with OTAs, it is important considering also other problems related to the promotion activities of these portals. In fact, it is not rare that an

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<sup>53</sup> <http://news.marriott.com/2016/03/marriott-rewards-member-rates-prove-it-pays-to-book-direct/>

<sup>54</sup> Delgado P. (2016) Cancellations shooting up: implications, costs and how to reduce them. Mirai

<sup>55</sup> Delgado P. (2016) Cancellations on Booking.com: 104% more than on the hotel website. Expedia 31% more. Mirai

<sup>56</sup> OTAs V. Direct Bookings: Finding the Right Balance (2017, 10 september) available on <https://hospitalitytech.com/otas-v-direct-bookings-finding-right-balance>

OTA spends on Google Ads using the hotel brand keywords, and the result of this operation is that the portal “steals” traffic from search engine to the website<sup>57</sup>. Furthermore, it should be considered that it is not only a matter of engine advertising, OTAs also exploit metasearch to generate more traffic: let us consider that Kayak sent people to OTAs 57 times more than on brand.com sites<sup>58</sup>.

Despite all these issues, the point of view of Patrick Whyte<sup>59</sup>, is that the “war” of hotels against OTAs is probably only taking place in America because there are more branded hotels (meaning at least three properties sharing the same name) respect to Europe and Asia, which are more fragmented markets. Being part of an hotel brand, generally means to have more economic capacity to invest in promotion and so, direct bookings can increase. Thanks to this possibility, in U.S. in the last six months, the number of people booking on brand.com increased at faster rate than the number of people booking on OTAs<sup>60</sup>.

After all these considerations, it is clear that the scenario is quite complex, and it is impossible stating if OTAs really represent an opportunity or a threat for the hospitality. Furthermore, in order to make this analysis complete, it should be also taken into consideration the so-called “Billboard effect”, a phenomenon according to which hotels – but not only them – that are listed on third-party distributors’ website, gain a reservation benefit in addition to direct sales (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009). Basically, the concept is that there are customers that go out from the OTA’s funnel to book from the website of the facility and so, increase direct bookings. This phenomenon was firstly studied by Chris Anderson, assistant professor at the Cornell School of Hotel Administration, who carried out an experiment in 2008 in collaboration with Expedia and JHM Hotels, described in “The billboard effect: Online travel agent impact on non-OTA reservation volume” (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009). The procedure consisted in taking into consideration four hotels (one independent and three branded) and each of them would have been displayed on the top of the first page of Expedia from seven to eleven days and then not displayed for a similar amount of time; this process has been made several times from October 2008 to December 2008 (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009). At the end every facility was displayed for 40 days and not displayed 40 days and so, it was possible comparing the

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<sup>57</sup> Prabu K. (2014) Online travel agents vs hotels – friends, enemies or frenemies?. Tnooz

<sup>58</sup> O’Neill S. (2013) Meta works well for the largest OTAs, while many hotels suffer. Tnooz

<sup>59</sup> Whyte P. (2017) The Direct Booking War Is a Myth, at Least in Europe. Skift

<sup>60</sup> Whyte P. (2017) The Direct Booking War Is a Myth, at Least in Europe. Skift

number of direct reservation (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009). In the best case (independent hotel), the average daily reservations when the hotel was displayed was higher of +26%, while in the worst case the reservation had increased of +7.5% (Anderson, The billboard effect: Online travel agent impact on non-OTA reservation volume, 2009). Basically, the conclusion of Anderson was that OTAs should not be only considered an intermediary, but also a promotion instrument for direct bookings.

Anyway, in more recent years some people affirm that the power of the billboard effect is fading out; one of them is Moe Ibrahim, CEO at Journeyful<sup>61</sup>, who said *“Perhaps the billboard effect theory held some weights in the early days of OTAs, where the consumer might have preferred to book direct, but the reality is today, consumers do not want to book direct”*<sup>62</sup>. Ibrahim is affirming that the customers have changed, and this is reasonable: nowadays people are more aware of the Web, as well as they are more used at making online transactions. Moreover, also OTAs has evolved, increasing their power (e.g. in promotion) and also the role of mobile should be considered. Even the same Anderson have some doubts about the existence of the billboard effect via mobile; he affirmed *“As phone/tablet usage grows, we may see a different story. Let’s say consumer switch to having higher conversion ratios on mobile devices. Then they probably won’t shop in an app and then call the hotel directly. They will instead shop and purchase via the app. So the billboard effect may be reduced”*.

The topic of the “dead” or “not-dead” of the billboard effect is very controversial, also because the phenomenon itself is not easy to be measured and so, it is probably impossible coming to a conclusion. Anyway, OTAs represent an important channel for accommodation facilities which can really improve the visibility and thus the profitability of a company; but it is important not forgetting that there are some criticalities concerning with them that should be considered too.

### *Short-term rent and home sharing portals*

In the previous chapter the OTAs were introduced and analysed. Generally, OTAs have always been more associated to hotels and bed and breakfasts, but something has changed and several portals, concerning with vacation rentals and having business models similar to OTAs, have arisen and become very popular. The purpose of the section is the analysis of them, identifying how the market

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<sup>61</sup> Online hotel booking platform aiming at cutting middlemen

<sup>62</sup> O’Neil S. (2014) Does the Expedia billboard effect still exist for hotels. *tnooz*

of short-term rental has evolved, what is driving the popularity of the portals, and the effects of the phenomenon.

As a first step, let us consider how much relevant this sector is in Italy and in Europe. According to the association Property managers Italia<sup>63</sup>, short term rental is the form of hospitality most diffused in the European Union with over 20 million of beds and an economic value of more than 80 billion of euros per year<sup>64</sup>. Moving to the Italian market, in a press release, Casevacanza.it<sup>65</sup> has affirmed that in 2017 the demand for vacation rentals has increased of the 10% and the growth does not only concern with the demand; the property owners that has decided to implement this solution has increased of the 8%<sup>66</sup>. Moreover, for the 2018 is estimated a growth of 15% of this market, that will reach the value of 115 million of euros<sup>67</sup>.

So, “*What has made this market so relevant in recent years?*”. It is possible stating that the growth of short term rental can be strongly related to the born and rise of home sharing portals. Home sharing portals can be seen as the declination of sharing economy in the hospitality industry and can work in two different ways. The first form of home sharing consists in the “exchange” of houses among people for a short period: one individual offers to another the stay to his/her place and then, the second one makes the same for the first. The other form of home sharing is the case where a private citizen makes his/her house/apartment/room available for travellers with no need by the seconds to host the former; so, there is no “house exchange”. The first form of home sharing is “older” respect to the other and an example of portal promoting it is Homelink<sup>68</sup>. On the other side, the second form is more recent and more linked to the growth of short term rentals, because it allows an individual with an “empty” house/room to rent it and make profits, helped by the visibility that home sharing portals can give<sup>69</sup>.

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<sup>63</sup> <http://www.propertymanagersitalia.it/>

<sup>64</sup> Fotia F. (2017) Turismo: boom per gli short term rental. Meteo Web

<sup>65</sup> Italian OTA for vacation rentals (<https://www.casevacanza.it/>)

<sup>66</sup> Si conferma e cresce il successo italiano del business delle case vacanza (2018, 21 february) available on [https://www.casevacanza.it/info/successo\\_business\\_case\\_vacanza](https://www.casevacanza.it/info/successo_business_case_vacanza)

<sup>67</sup> Si conferma e cresce il successo italiano del business delle case vacanza (2018, 21 february) available on [https://www.casevacanza.it/info/successo\\_business\\_case\\_vacanza](https://www.casevacanza.it/info/successo_business_case_vacanza)

<sup>68</sup> <https://homelink.it/>

<sup>69</sup> Pepponi E. (2017) Home sharing: come guadagnare affittando casa. Economia Italia

Among the different portals it is possible talking about Homeaway<sup>70</sup> and Homeholidays<sup>71</sup> that are part of the Expedia Group, Casevacanza.it (already presented) and Homestay<sup>72</sup>; but the company that is the most responsible for the high popularity of home sharing is Airbnb<sup>73</sup>. Airbnb was founded in 2007 by Brian Chesky, Joe Gebbia and Nathan Blecharzyk and the idea of this business arises after Chesky and Gebbia decided to offer some places to sleep in their house in order to gain extra- moneys<sup>74</sup>. Then, less than 10 years later, the company has become the most visited website in the world of travel, with 106.9 million of visits in the first three months of 2017<sup>75</sup>.

According to a report by Airbnb (Airbnb, 2016), in 2015 in Italy, the 92% of the users were leisure travellers, but it is not correct believing that home sharing is something excluded to business travel. Let us first consider that the main customer base of Airbnb is represented by millennials<sup>76</sup> and according to a study released by the Global Business Travel Association<sup>77</sup>, reported by Skift, this segment may also affect the business travels<sup>78</sup>. According to the study, involving business travellers from UK, France and Germany, individuals between 18 and 34 that often – or always - uses home sharing platforms represent the 41% of English respondents, 36% of German ones and 28% of French ones<sup>79</sup>. On the other side travellers aged 35 to 54 are not able to reach these percentages; so, this suggests that business travellers could be much more likely to use sharing services in the future, as older travellers exit the workforce<sup>80</sup>.

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<sup>70</sup> <https://www.homeaway.com/>

<sup>71</sup> <https://www.homelidays.com/>

<sup>72</sup> <https://www.homestay.com/>

<sup>73</sup> <https://www.airbnb.it/>

<sup>74</sup> <http://webcrew.it/airbnb/>

<sup>75</sup> Airbnb sorpassa tutti: il sito di home sharing è il più consultato nel settore ospitalità con 106,9 milioni di visite in 3 mesi (2017, 31 may) available on

[https://www.eventreport.it/stories/mercato/132541\\_airbnb\\_sorpassa\\_tutti\\_il\\_sito\\_di\\_home\\_sharing\\_il\\_pi\\_consultato\\_n\\_el\\_settore\\_ospitalit\\_con\\_1069\\_milioni\\_di\\_visite\\_in\\_3\\_mesi/](https://www.eventreport.it/stories/mercato/132541_airbnb_sorpassa_tutti_il_sito_di_home_sharing_il_pi_consultato_n_el_settore_ospitalit_con_1069_milioni_di_visite_in_3_mesi/)

<sup>76</sup> Airbnb sorpassa tutti: il sito di home sharing è il più consultato nel settore ospitalità con 106,9 milioni di visite in 3 mesi (2017, 31 may) available on

[https://www.eventreport.it/stories/mercato/132541\\_airbnb\\_sorpassa\\_tutti\\_il\\_sito\\_di\\_home\\_sharing\\_il\\_pi\\_consultato\\_n\\_el\\_settore\\_ospitalit\\_con\\_1069\\_milioni\\_di\\_visite\\_in\\_3\\_mesi/](https://www.eventreport.it/stories/mercato/132541_airbnb_sorpassa_tutti_il_sito_di_home_sharing_il_pi_consultato_n_el_settore_ospitalit_con_1069_milioni_di_visite_in_3_mesi/)

<sup>77</sup> <https://www.gbta.org/>

<sup>78</sup> Sampson H. (2017) Millennials Are the Biggest Adopters of Sharing Services in Business Travel. Skift

<sup>79</sup> Sampson H. (2017) Millennials Are the Biggest Adopters of Sharing Services in Business Travel. Skift

<sup>80</sup> Sampson H. (2017) Millennials Are the Biggest Adopters of Sharing Services in Business Travel. Skift

The impact of Airbnb and the other home sharing portals is not limited to the economic perspective, but it encompasses also the social and environmental ones. First of all, it is important understanding that people travelling with home sharing portals are not only driven by the possibility of spending less, but also by the opportunity of living in a strict contact with the culture of the country where they are headed; in 2015, the 87% of Airbnb users travelling to Italy was driven by this reason (Airbnb, 2016). Then should be considered that on the environmental point of view, Airbnb hosts are really interested in eco-friendly practices: the percentage of application of them in 2015 was about 98% (Airbnb, 2016). In 2014 Airbnb engaged Cleantech Group<sup>81</sup> to conduct an analysis aimed at comparing the environmental impact of Airbnb properties against the stay at hotel, with the following results (Cleantech Group, 2014):

- Lower energy and greenhouse gas impact of Airbnb properties. Per-guest night, an Airbnb guests uses an estimated 63% to 71% less energy than hotel guests in North America and the associated CO<sub>2</sub> emissions are 61% to 82% lower (Cleantech Group, 2014). In Europe the difference is even wider: energy consumption is 78% to 84% lower and the associated CO<sub>2</sub> emissions are about 88% lower (Cleantech Group, 2014).
- Lower water impact of Airbnb properties. Per-guest night, an Airbnb guests uses an estimated 12% to 39% less water in North America respect to hotel guests and 48% to 57% less in Europe (Cleantech Group, 2014).
- Lower waste generation of Airbnb guests. It is estimated that Airbnb guests generate 22% to 53% less waste respect to hotel guests in North America and the percentage is similar in Europe (Cleantech Group, 2014).

Anyway, there are also some issues concerning with home sharing portals that cannot be neglected. First of all, the increase of this offering creates more competition in the hospitality industry and some complains about the unfair competition. The complains are mainly related to the payment of taxes: there are several individuals that rent their houses/rooms on Airbnb, but do not pay taxes on their earnings; and for government is hard to make controls. Just to make some examples on the Italian territory: in 2016, in Rome 8,600 non-hotels lodging facilities were official registered, but the announcements about the city on Airbnb were over 20 thousand, while in Milan the announcements were 12,841 against 515 officially registered<sup>82</sup>. Thus, under the pressure of the hoteliers association

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<sup>81</sup> <https://www.cleantech.com/>

<sup>82</sup> Marini G. (2016) Viaggio tra i “furbetti” di Airbnb: soltanto uno su quattro denuncia di affittare. La Stampa

Federalberghi<sup>83</sup>, on 24 April 2017 the Italian government has issued a new law decree according to which online portals will substitute the house owners in the payment of the taxes, with a rate of 21%<sup>84</sup>. Airbnb refused to apply this law and nowadays the dispute among the Italian government and the company is still open.

Another problem related to home sharing portals is the type of tourism that they can generate: some cities and destinations complain about the “wild” tourism generated by home sharing. In order to better understand, let us consider the case of Ibiza: in the summer of 2017, the island was characterized by a strong tourism flow (mainly driven by home sharing portals) that has obliged seasonal workers to stay in overcrowded facilities and paying a lot for them; so, the municipality decided to ban the booking from any online platform<sup>85</sup>. Moreover, it is important considering that home sharing platforms may promote a low-quality touristic flow. For instance, on summer 2017 the number of tourists coming to Rome has increased respect 2016, but the problem was that they were low-cost tourists that stayed in non-hotels facilities (also illegal) and ate take away, with an overall expense of 67 euros per day<sup>86</sup>.

Finally, home sharing portals have really been an important driver for the growth of short term rentals and thanks to them it was possible increasing the touristic offering of localities, but there are still some criticalities and it may be useful a collaboration with territories and governments in order to overcome them.

### *Review portals*

Among the different portals that are linked to the hospitality industry it is important not forgetting about portals containing reviews about accommodation facilities and restaurant activities. The mission of these portals is to present all the different options that a customer can have, but also to provide the opinions of other customers that have tried them. Basically, review portals provide a different point of view: people can know from past customer what to expect from a company.

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<sup>83</sup> <http://www.federalberghi.it/index.aspx>

<sup>84</sup> Locazioni brevi: la cedolare secca del 21% è legge. Airbnb farà da sostituto d'imposta (2017, 26 april) available on [http://webitmag.it/locazioni-brevi-la-cedolare-secca-legge-airbnb-fara-sostituto-dimposta\\_127464/](http://webitmag.it/locazioni-brevi-la-cedolare-secca-legge-airbnb-fara-sostituto-dimposta_127464/)

<sup>85</sup> Ibiza contro il turismo selvaggio: basta Airbnb e piattaforme simili (2018, 16 february) available on <https://www.quotidiano.net/magazine/viaggi/ibiza-contro-il-turismo-selvaggio-basta-airbnb-e-piattaforme-simili-1.3728541>

<sup>86</sup> Garrone L. (2017) A Roma aumentano i turisti ma spendono solo 67 euro al giorno. Corriere della Sera

Thanks to these portals, it is easier for a tourist knowing the offering of a particular area and the actors of hospitality industry can improve their visibility online as well as collect feedbacks from customers, which can be helpful to improve the service level. So, since tourists use these tools, it is important for the providers of the hospitality to exploit them: according to the Observatory Digital Innovation in Tourism of the School of Management of Politecnico di Milano, in the inspiration phase, the 33% of tourists looks at online reviews (data of 2017) (Osservatorio Innovazione Digitale nel Turismo of the School of Management of Politecnico di Milano, 2017). The high use of these portals was also witnessed in 2011 by a study of Mondial Assistance USA (today become Allianz Global Assistance<sup>87</sup>) that affirms that the 60% of travellers takes into consideration other travellers' online reviews<sup>88</sup>.

For sure, the most famous review sites for travellers is represented by TripAdvisor<sup>89</sup> with over 155 million of visits per week<sup>90</sup>; it includes reviews concerning with hotels, restaurants, vacation rentals and also activities. An alternative to TripAdvisor may be Yelp<sup>91</sup>, which can be less popular, but it includes also review concerning with other fields, like shops of different types (clothes, souvenir, ...) as well as pharmacies and other businesses.

The users of review portals have proved to be really influenced by the opinions of other users and in fact, according to a study of Chris Anderson in 2012, if a hotel increases its reviews score by 1 point on TripAdvisor, it can increase the price by 11.2% and still maintain the same occupancy or market share (Anderson, The Impact of Social Media on Lodging Performance, 2012). So, having a good positioning on review sites can represent an important advantage for a company, which can increase profit by raising margins without reducing the demand or maintain the same price, thus increasing the demand. Good reviews can impact positively a company – and thanks to Anderson there is also a quantitative analysis – but let us now consider negative reviews. In an experiment of 2009 by Sun-Jae Doh, and Jang-Sun Hwang (Doh & Hwang, 2009) it was discovered that few negative messages within the majority within the majority of positive messages are not critically harmful. Moreover, the

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<sup>87</sup> <https://www.allianztravelinsurance.com/>

<sup>88</sup> Online word of mouth affects bookings: study (2011, 13 december) available on <https://www.eyefortravel.com/social-media-and-marketing/online-word-mouth-affects-bookings-study>

<sup>89</sup> <https://www.tripadvisor.com>

<sup>90</sup> Source: SimilarWeb for the month of February 2018

<sup>91</sup> <https://www.yelp.com/>

conclusion of Sun-Jae Doh, and Jang-Sun Hwang was that some negative reviews can be beneficial because they give credibility (Doh & Hwang, 2009).

So, the study of Sun-Jae Doh, and Jang-Sun Hwang pointed out an important issue concerning with reviews: the credibility. As previously stated, review portals have become very popular and good performances on them may improve the profitability of a company; so, this have brought the rise of some opportunistic behaviours. It is possible talking about:

- The businesses of “fake reviews”: there are Web agencies that sell packages of positive or negative reviews, in order to increase the reputation of an activity or damage the one of competitors<sup>92</sup>.
- Fake reviews from “insiders”: some businesses may not have a good rating or have to face competitors too “strong” and so decide to write positive reviews about themselves or negative ones about the others<sup>93</sup>.
- Opportunistic behaviours of customers: some customers may try to gain more benefits from a company, threatening them of making bad reviews.

These criticalities are strictly related to the anonymity of the respondents and to the fact that, because of the huge amount of reviews, it is hard for portals to completely monitor all the discussions. On the side of the providers of hospitality, it could be useful to answers to negative reviews and report “suspicious” reviews to the portal. Moreover, from the collaboration of FIPE with TripAdvisor it was created the service “SOS recensioni”, which is aimed at giving support to FIPE associates against “unfair” reviews<sup>94</sup>. The idea is that if the company needs an additional support, that the TripAdvisor customer service cannot give, he/she can exploit this new service of FIPE, that will be directly in contact with the American company<sup>95</sup>.

On the other side, to solve the different issues, the portals should analyse the report made by the companies as well as continuously monitoring the activities on the website. In TripAdvisor, this monitoring consists in making an analysis of every review before publishing it: the review will be

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<sup>92</sup> Madron A. (2014) Tripadvisor, dagli annunci al pagamento. Ecco come è facile barare sulle recensioni. Il Fatto Quotidiano

<sup>93</sup> Henry R. (2015) Fake reviewers go to town with TripAdvisor. The Times

<sup>94</sup> Fipe lancia SOS Recensioni (2018, 20 february) available on <https://www.confcommercio.it/-/fipe-lancia-il-servizio-sos-recensioni>

<sup>95</sup> (2018) Fipe lancia SOS Recensioni. Confcommercio.it

object of 50 filters that will decide if it can be published or not (text analysis); in the case filters are not able to arrive to a conclusion the decision will be made by a member of the staff<sup>96</sup>.

Finally, review sites can be very important instruments for presenting the offering of a certain destination and thanks to them the hospitality industry providers can improve their visibility, as well as their profitability – if they have good reviews – and also collect feedbacks from customers. Nevertheless, some opportunistic behaviours risk to damage the purpose of these sites; in order to avoid this, it is important that both companies and portals put effort in fighting unfair actions.

### *Food-related applications*

In an era when applications are expanding in every field – transportation, banking, education are only some examples – also the world of food has collided with this reality. There are apps for grocery, like Cortilia<sup>97</sup>, which deliver fresh food from farms or app for nutrition, like MyFitnessPal<sup>98</sup>, which allows to monitor the calories earned and loss during the day; and there are even apps which may support restaurant activities in their business.

The first type of apps that it is possible talking about are apps for finding restaurants. Like metasearch, these apps allow to find the restaurant activities in a certain area and compare them also exploiting reviews published on the portals. Examples of these apps are the app of TripAdvisor, Yelp (already presented), Zomato<sup>99</sup> and others.

For a restaurant activity is also important taking into consideration apps that allow the users to make an online reservation. Making an analogy, online table reservation apps can be seen as the OTAs of restaurant activities. Sheryl E. Kimes, a Singapore Tourism Board Distinguished Professor of Asian Hospitality Management at the Cornell University School of Hotel Administration, in her “How Restaurant Customers View Online Reservations” (Kimes, 2009), made an interesting analysis of this service. She affirmed that a restaurant activity implementing a third-party online reservation system can have the following benefits:

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<sup>96</sup> Fox L. (2015) Online DNA – how TripAdvisor puts reviews under the microscope. Tnooz

<sup>97</sup> <https://www.cortilia.it/>

<sup>98</sup> <https://www.myfitnesspal.com/>

<sup>99</sup> <https://www.zomato.com/it/milano>

- Reduced processing costs: the system can reduce the personnel costs, because not as many employees will be required to take telephone reservation (Kimes, 2009). Anyway, the system is not aimed at misplacing completing the collection of reservation through telephone call.
- Increased volume and revenues: the customers can make a reservation any time they want and so, the risk of losing a reservation is reduced (Kimes, 2009).
- Improved service quality: the system can also provide a more consistent service experience to its guest since each time a reservation is made, the process is exactly the same (Kimes, 2009). On the other side, telephone reservation experiences may vary according to the training and commitment of the person taking the reservation (Kimes, 2009).

Kimes also pointed out some drawbacks in the use of these systems:

- Loss of personal connection: there is not a direct interaction with the customer.
- Costs: the service is not for free and there is the risk of becoming too dependent on intermediaries.
- Potential loss of business: since third-party vendors provide vendors potential customers with reservations information about multiple restaurants, it is possible that restaurants listed on these websites may be unwittingly sacrificing customers to their competition (Kimes, 2009).

Another type of application that it is affecting the restaurant activities market are the food delivery apps. Worldwide, the market for food delivery stands at €83 billion, or 1 percent of the total food market and 4 percent of food sold through restaurants and fast-food chains<sup>100</sup>. In order to understand how much interest there is on this market, let us consider the Figure 1 about the investment in food ordering companies.

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<sup>100</sup> Hirschberg C., Rajko A., Schumacher T., and Martin Wrulich (2016) The changing market for food delivery. McKinsey & Company

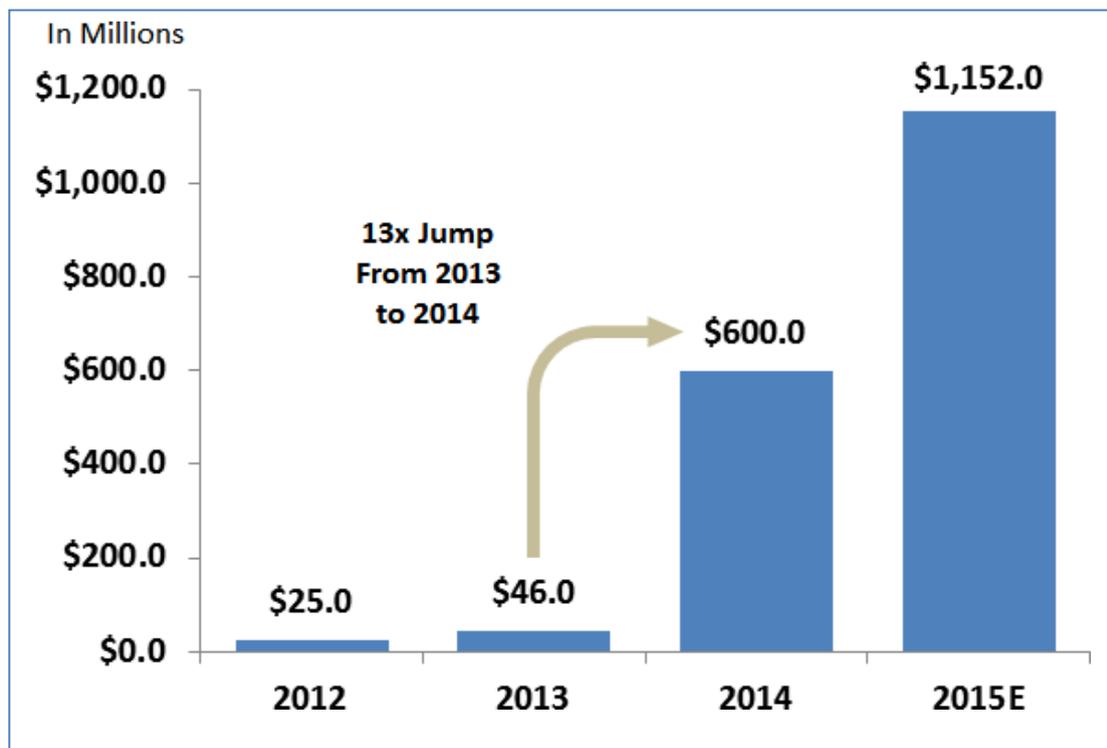


Figure 2: worldwide investment in food ordering companies<sup>101</sup>

While just 46 million and 25 million of dollars were invested in 2013 and 2012 respectively, a staggering 600 million of dollars were invested in 2014<sup>102</sup>. So, it is correct to expect that the market will not stop growing. By far, the most common form of delivery is the traditional model (90% of the market share), in which the consumer places an order with the local restaurant -through traditional instruments like the phone call - and waits for the restaurant to bring the food to the door and almost three-quarters of these orders are still placed by phone<sup>103</sup>. But the market of online food delivery should not be underrated. In fact, the latest market research (Technavio, 2017) by Technavio on the global online on-demand food delivery services market predicts a CAGR close to 32% during the period 2017-2022<sup>104</sup>. So, for a restaurant activity could be useful entering this market exploiting external apps.

<sup>101</sup> Kim E. (2015) A Secular Shift To Online Food Ordering. TechCrunch

<sup>102</sup> Kim E. (2015) A Secular Shift To Online Food Ordering. TechCrunch

<sup>103</sup> Hirschberg C., Rajko A., Schumacher T., and Martin Wrulich (2016) The changing market for food delivery. Mckinsey.com

<sup>104</sup> Online On-demand Food Delivery Services Market - Growth Analysis and Forecast (2017, 13 december) available on <https://www.businesswire.com/news/home/20171213006080/en/Online-On-demand-Food-Delivery-Services-Market-->

According to JungleWorks<sup>105</sup>, IT company of Seattle, it is possible distinguishing in 3 models of food delivery apps:

- The Order Only Model: it was adopted by the first generation of restaurant delivery services like JustEat and Grubhub and consisted in aggregating in one portal the offerings of several restaurant activities that already have their own food delivery system. Basically, these portals work as a marketplace and the logistic of the delivery is a responsibility of the restaurant activity.
- The Order and Deliver Model: in this model the portal (e.g. Deliveroo or Foodora) is responsible for collecting the orders and in addition it also provides the restaurant activity with the logistic to deliver the meals. With this model, also restaurant activities that did not make home delivery can enter this market.
- The Fully Integrated Model: a more recent business model, consisting in a portal that manages the order the logistic, but also the kitchen. The businesses implementing this solution need hubs (i.e. kitchen) that cater to the food orders of a particular area. Example of companies implementing this model are Sprig, Maple and SpoonRocket.

Online reservation systems and online food delivery may represent an opportunity for restaurant activities and external applications are not the only solution. A company can decide to develop these instruments inside its own channels (e.g. web site). Of course, in this case there will be a cost for the development of the solution, but all the bookings or orderings will be with no intermediation and so, no additional costs.

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<sup>105</sup> Singh A. (2016) Food On Demand: Business Models of Meal Delivery Startups. JungleWorks

# Empirical analysis

# The objectives

Without any doubt, the Digital Revolution has provided several solutions that can improve the performances of accommodation facilities and restaurant activities, and these include: owned online channels and instruments for managing and promoting them, digital solutions for the management of operations and also the support of online actors. Some solutions can improve the direct channels (e.g. increasing the portion of bookings from website) and/or other performances, like costs or revenues, without the involvement of third parties; but these need investment of time and/or money. Some other solutions involve third-party companies from the online environment, like OTAs and metasearch and this way the problem of investment can be overcome; but on the other side, the high dependency on them, can lead to make the actors of hospitality ask themselves if there are missing opportunities and if the support of Internet companies is really needed. So, it is hard for a company of the hospitality to understand what is the optimal mix of solutions.

In this complex scenario, the objective of the empirical analysis is to make an investigation of the Italian hospitality industry and in particular the objectives will be the following:

- Determining what are the dominant behaviours and attitudes of Italian accommodation facilities and restaurant activities.
- Formulating hypotheses about the reasons behind dominant behaviours and attitudes and also trying to verify these hypotheses.
- Underlying some activities or strategies that seem to be more correlated to improvement of performances (direct bookings, expected revenues, ...)

# Methodology

As it was pointed out in the literary review, nowadays the actors of hospitality industry have the possibility to exploit several online channels and new digital technologies, as well as to deal with “new” actors emerging from the Web. With the purpose of understanding how the Italian hospitality industry is managing these changes, a market research, consisting of two different surveys, has been conducted, in collaboration with the Observatory Digital Innovation in Tourism of the School of Management of Politecnico di Milano. In the next points, the description of the surveys and the steps for sending and managing them will be presented, as well as the general characteristics of the samples generated by them.

## Surveys characteristics

One of the survey was headed to Italian accommodation facilities, while the other to Italian restaurant activities. However, it is important underlying that some respondents may have answered both the surveys, because they have – or work for – both an accommodation facility and a restaurant activity.

The accommodation facilities survey consisted of 46 questions and the restaurant activities one of 39; however, for the respondents there is not only one path: some questions may be displayed or not, depending on previous answers. In order to make an example, if someone answered a question about OTAs, affirming that it is not present on them, the following question about the commissions paid to OTAs will be skipped.

The complete texts of the two surveys are reported in Appendix A and Appendix B; while their different sections are following reported.

### Accommodation facilities survey

1. SECTION 1: the management of data and the communication with customers
2. SECTION 2: the promotion activities
3. SECTION 3: the bookings receiving
4. SECTION 4: the other digital instruments
5. SECTION 5: the impact of new technologies
6. SECTION 6: the anagraphical information about the facility.

### Restaurant activities survey

1. SECTION 1: the digital instruments for communication
2. SECTION 2: the digital instruments for booking
3. SECTION 3: the other digital instruments
4. SECTION 4: the services available at the local
5. SECTION 5: the general information

## Databases generation

The two surveys were created and managed through the CAWI (Computer Assisted Web Interviewing) methodology, thanks to the support of Opinio<sup>106</sup>, an online platform that allows to send, manage and collect results of online questionnaires. Opinio sends the surveys directly to lists of email contacts and so, it was necessary the creation of big databases of restaurant activities and accommodation facilities email addresses.

Databases concerning with accommodation facilities were generated exploiting the contacts used by the Observatory in similar surveys of the previous years, but also adding other contacts provided by Agriturismo.it<sup>107</sup> and Casevacanza.it. Similarly, the restaurant activities databases were created from last year survey of the Observatory, adding contacts provided by Agriturismo.it; moreover, FIPE collaborated, sending the link of the survey to its associate. Anyway, before uploading these databases on Opinio, a process of “data cleaning” was needed, in order to delete duplicates and contacts of activities that are no longer operating or were not interested in the surveys in the past.

At the end of the process it was possible to count on the contacts of 70,262 accommodation facilities and 10,563 restaurant activities.

## Surveys management

The survey of restaurant activities was activated on May 2017, while the one of accommodation facilities started on June 2017.

After the sending, it was important carrying out some other activities:

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<sup>106</sup> <https://survey.opinio.net/admin/folder.do>

<sup>107</sup> Agriturismo.it is a portal that offers visibility to many Italian lodging facilities in rural areas, working as a metasearch (<https://www.agriturismo.it/>)

- Support activities. Some of the businesses involved in the researches needed more information or were not interested in the survey; so, the Observatory team contacts them (through email or phone call) in order to provide useful information and understand the reasons of the no interest. This way it was possible better understanding the dynamics of the sector.
- Databases modification. Another important operation was the cleaning of databases during the survey, based on the fact that some contacts, through direct emails or automatic messages, have shown not to be interested or not to be in the condition for answering (e.g. closed business). So, these contacts were deleted from the databases.
- Creation of reminds. Opinio also offers the possibility of making reminds: basically, on dates planned by the user, the platform sends to the contacts an email with a link that allows to go on compiling the survey - for those that have not finished the questionnaire – or to simply begin it, for those who has not started yet.
- Monitoring of answers. The number of respondents and the stored (people that have begun, but not concluded the survey) were weekly monitored, in order to understand if the sample, that was generating, was statistically relevant and thus, plan the use of reminds.

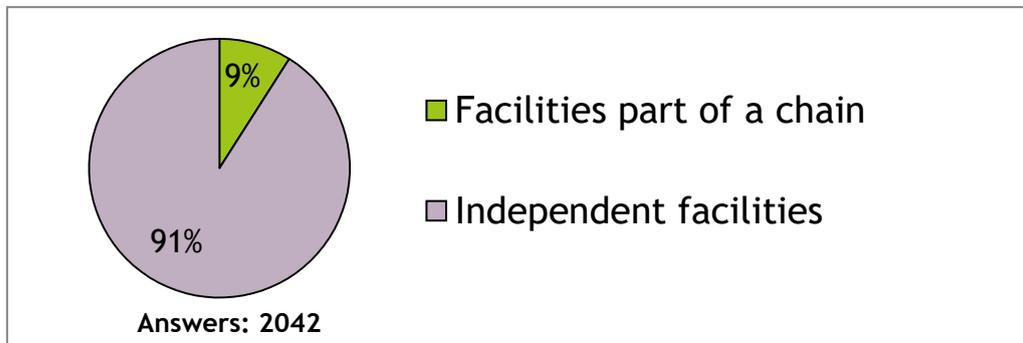
The two surveys were closed on September 2017, having collected 856 respondents of restaurant activities survey and 2,061 respondents of accommodation facilities one. In particular, these numbers are referred to all the respondents that have completed the survey or answered at least two questions. However, it is important pointing out that before starting with the elaboration of the information collected, it was made a check of the data, from which it resulted that some respondent may have answered more times than requested. This was due to the fact that sometimes, one person uses more than one email and so, it occurs that different emails in the databases referred to the same person and so, same accommodation facility or restaurant activity. Thus, in order to work on accurate samples, representative of the Italian reality, the duplicated were deleted and the final number of respondents was 763 for restaurant activities and 2,042 for accommodation facilities.

## Samples characteristics

Before starting with the analysis, it is important presenting the main characteristics of the respondents, underlying general information, economic-related information, as well as information about the customer base. Moreover, this section aims at anticipating how the results will be presented in the next part: whenever a graph or a data is reported, it will be always shown the number of “Answers”,

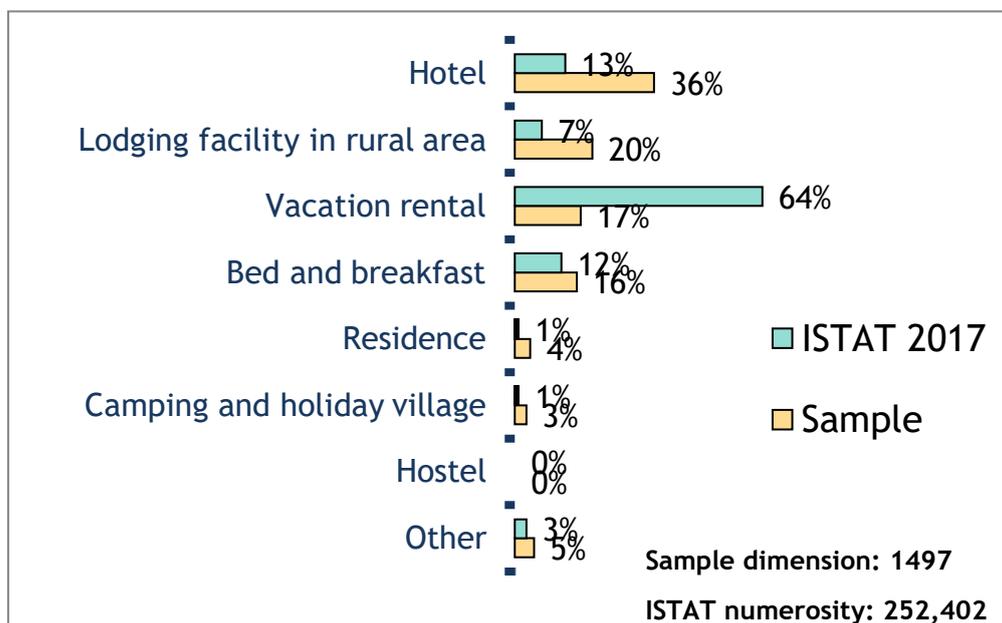
which basically is the number of respondents that answered that question - or questions in case of cross-overs -.

### Accommodation facilities



Graph 4: types of accommodation facilities respondents (independent or part of a chain)

The majority of respondents is represented by independent facilities and this is in line with an Italian economy made of many independent enterprises and few chains<sup>108</sup>(Graph 4). But let us now have a look at Graph 5, to see the types of facilities involved in the survey and compare them with the ISTAT data presented in the Part 1 of the literary review.

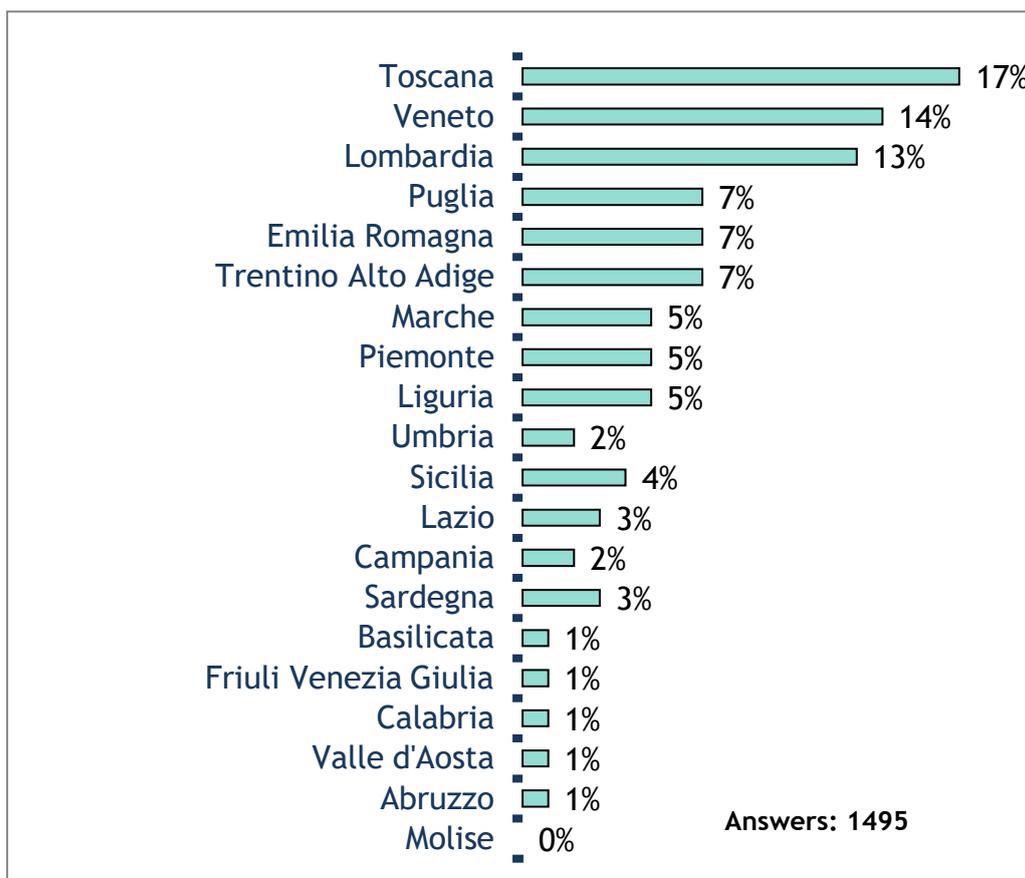


Graph 5: types of accommodation facilities (ISTAT comparison)

<sup>108</sup> (2012) Le imprese in Italia? 64 ogni 1.000 abitanti (2012, 27 January) available on <https://www.digital4.biz/pmi/le-imprese-in-italia-64-ogni-1000-abitanti/>

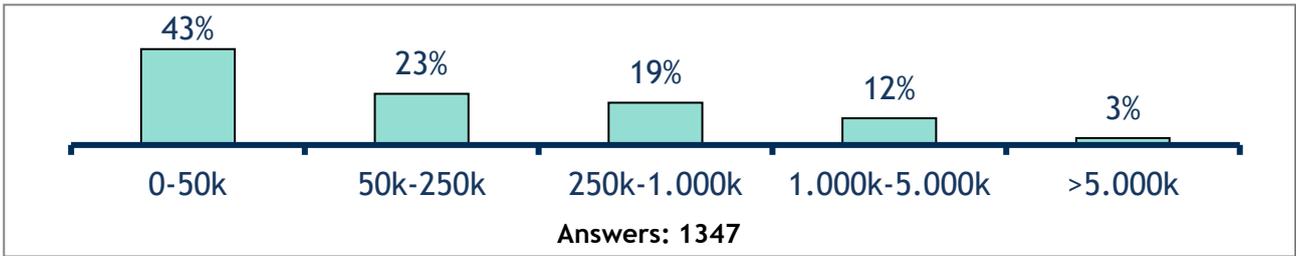
As it can be noticed, the main differences of the sample, respect to the Italian market, are the high presence of hotels and the low presence of vacation rentals. Anyway, trying to engage vacation rentals in this type of research is not easy, because sometimes the owner is a private citizen that tries to make extra-money renting his/her property with the help of an intermediary (i.e. home sharing phenomenon). So, this person is not really “inside the business”.

On the geographical point of view, it seems like the sample is mainly made by facilities from the North of Italy as shown by Graph 6.



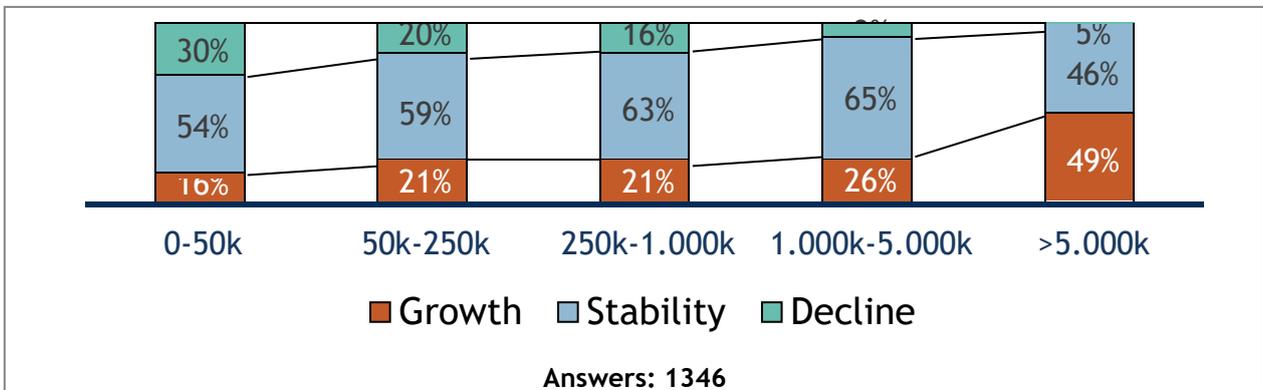
*Graph 6: Italian regions where the facilities are located*

Let us now consider some economic information about respondents and the origin of their customers. From Graph 7, it is possible noticing that the sample is mainly made by facilities with low incomes; in fact, about the 66% of the accommodation facilities respondents had revenues lower than 250 thousand of euros in 2016.



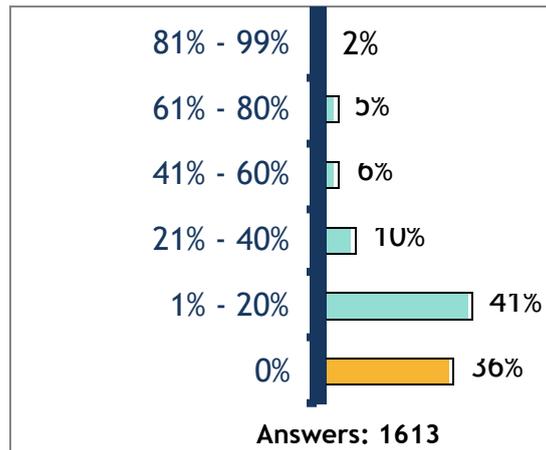
Graph 7: distribution of the facilities based on the range of revenues for the year 2016 (data in euros)

The low turnover seems also to be more linked to scepticism, in fact, there is higher percentage of facilities with low income expecting a reduction in the overall revenues of 2017 respect to those with high income (Graph 8).



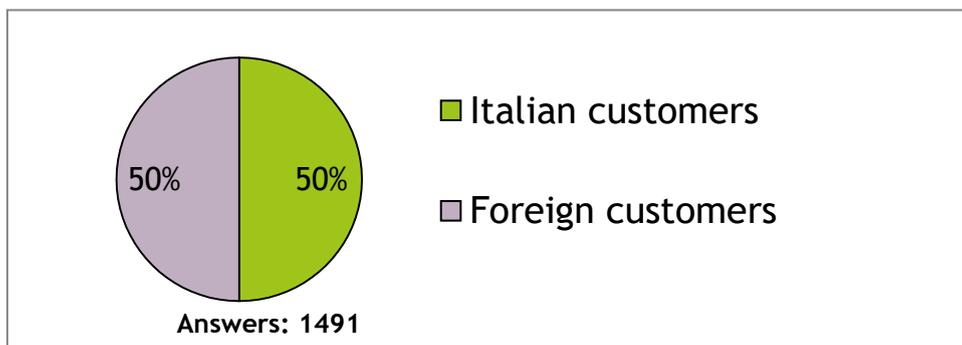
Graph 8: expectation for 2017 revenues subdivided per the range of revenues of 2016

The business component seems not to be very present in the sample, in fact, the 36% of respondents does not deal with the business segment and for the 41%, it accounts for less than the 20% of the overall revenues (Graph 9)



*Graph 9: distribution of accommodation facilities based on the percentages of 2016 revenues coming from business travellers*

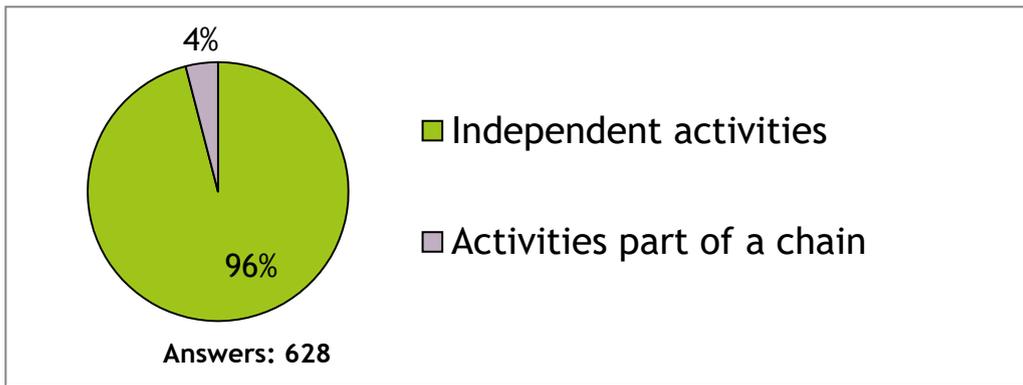
On the other side, the origin of the customers is well-split: half of the customers are foreigners and half are national (Graph 10).



*Graph 10: origin of the customers of the respondents*

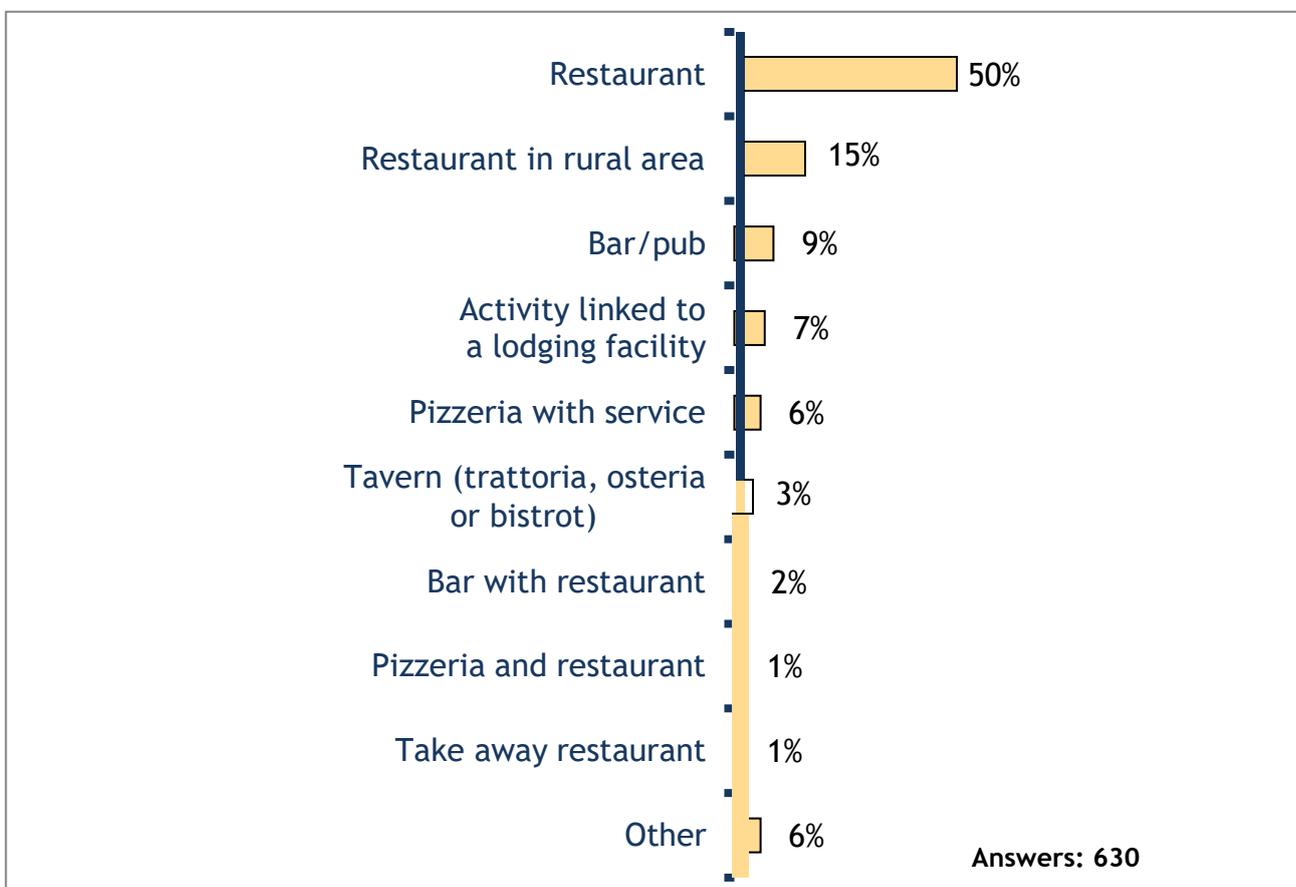
### *Restaurant activities*

Also for restaurant activities, the majority of the sample is made of independent activities, as shown in Graph 11.



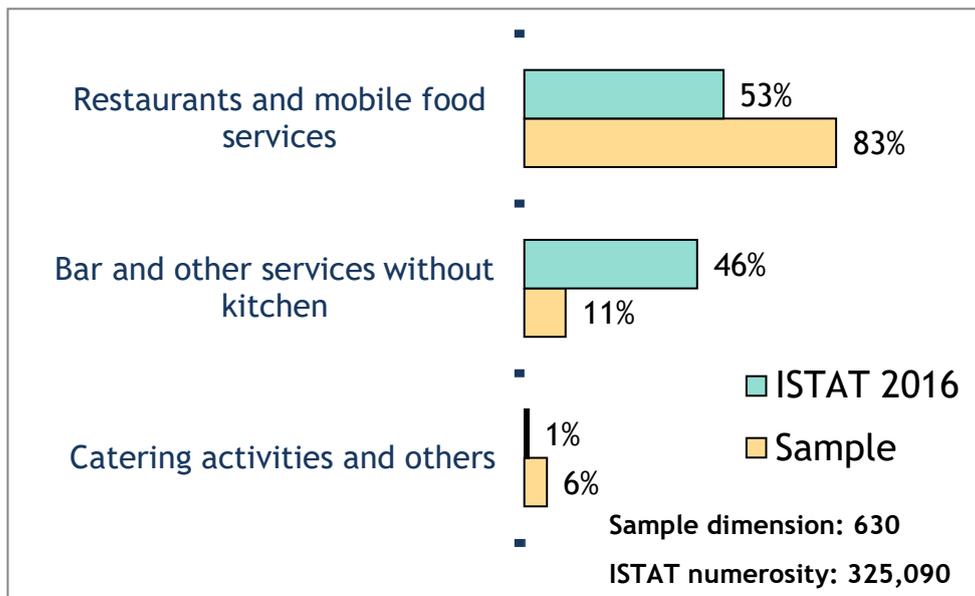
Graph 11: types of restaurant activities respondents (independent or part of a chain)

The types of different restaurant activities are shown in Graph 12.



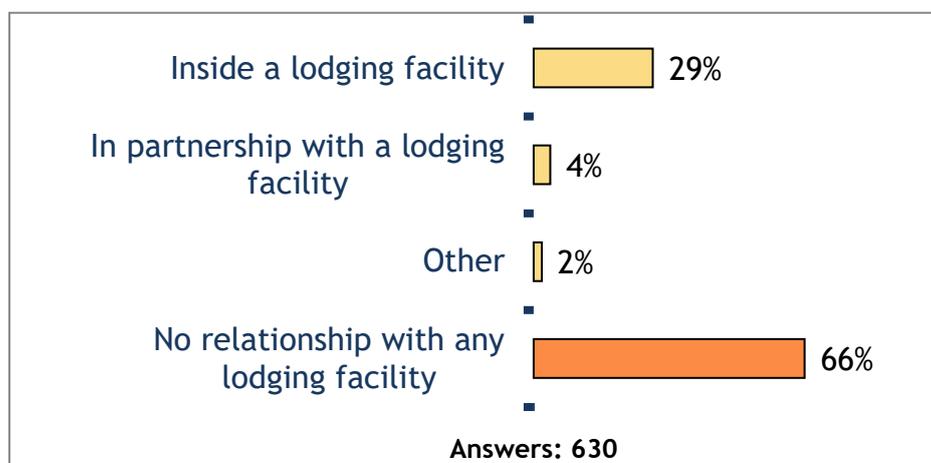
Graph 12: types of restaurant activities

Despite there are different types of restaurant activities, most of them go under the category of “restaurants” and for this reason, comparing these results with the ISTAT data presented in the Part 1 of the literary review, it is possible affirming that the sample lack of Bar and other services without kitchen, which should be more engaged (Graph 13)



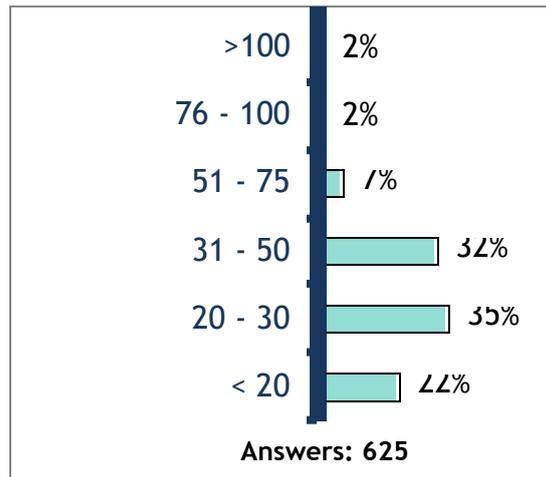
Graph 13: types of restaurant activities (ISTAT comparison)

The sample is also made of activities that tend to not have relationship with accommodation facilities: only the 2% carries out partnership with lodging facilities and only the 29% is present inside them (Graph 14).



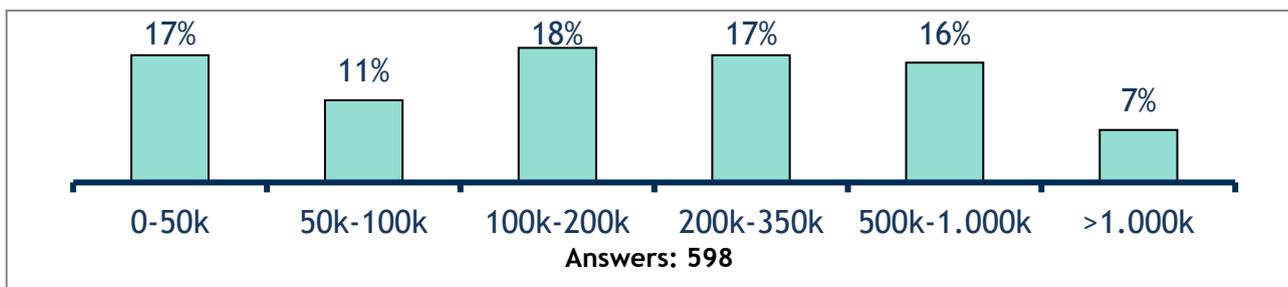
Graph 14: relationship of the restaurant activities with lodging facilities

For what concerns the prices of the activities of the sample, the majority of the activities are in a low range of prices: the 57% of them has an average receipt value per person lower than 30 euros (Graph 15).



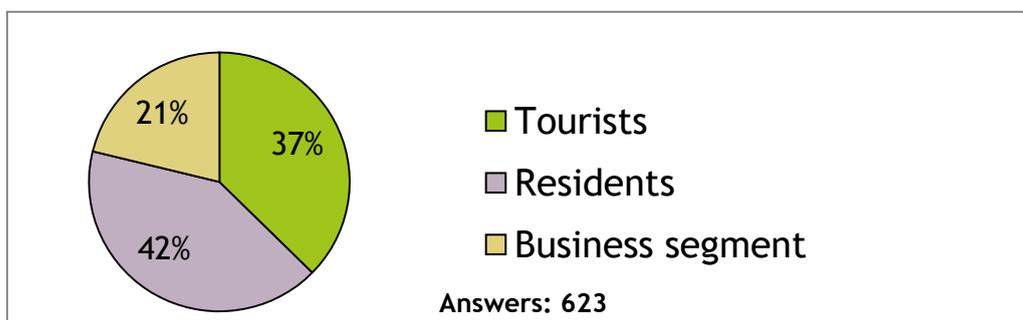
Graph 15: average receipt value per person in euros

On the point of view of revenues, it is possible talking about a certain homogeneity (Graph 16), but, as it can be expected, respect to the sample of accommodation facilities the income is generally lower.



Graph 16: distribution of the activities based on the range of revenues for the year 2016 (data in euros)

Finally, the customer base of the sample seems to be more related to residents than tourists and is possible saying that the business segment has a relevant impact (21% of the customer base on average) (Graph 17).



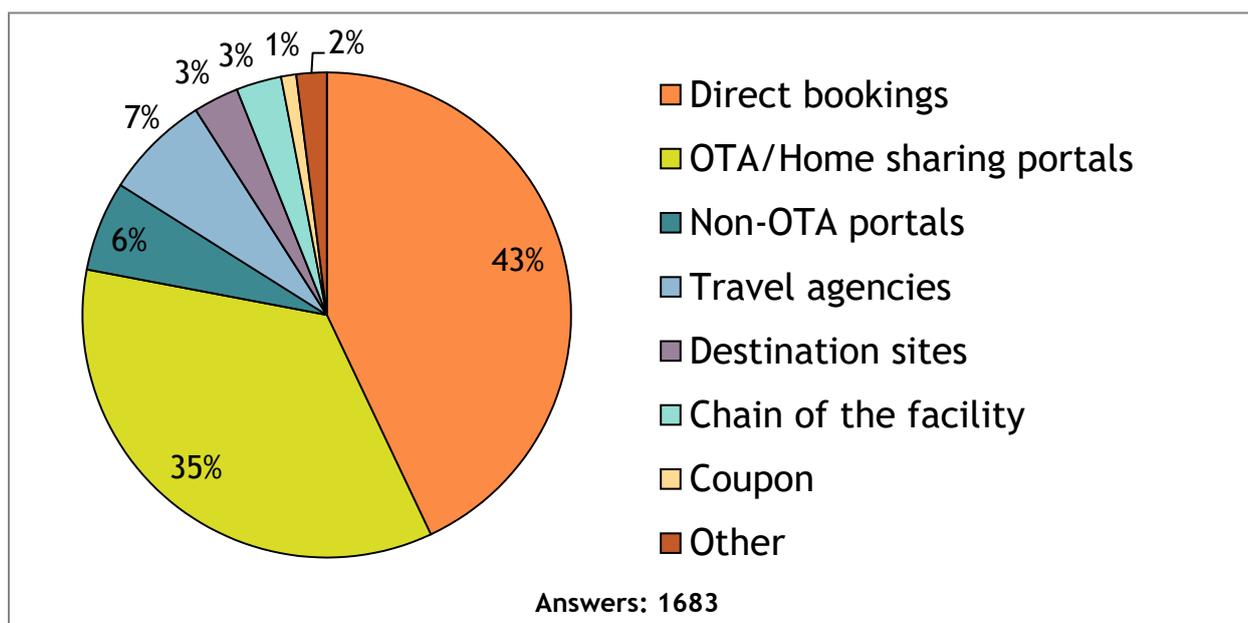
Graph 17: types of customers of the respondents

# Researches results

## Booking channels

The main purpose of this chapter is the understanding of the channels from which Italian accommodation facilities and restaurant activities receive bookings. As it will be shown in the next chapters, the attitude towards a channel may vary – also significantly – depending on different factors, which include the strategies and the relationship adopted as well as the type of activity (e.g. lodging facilities in rural areas may prefer different channels respect to hotel). So, this chapter wants to be a first insight about the booking channels.

Starting with accommodation facilities, on average the 43% of the bookings of respondents comes from direct channels and the remaining 67% involves intermediaries (both online and offline). (Graph 18)



*Graph 18: booking channels of accommodation facilities*

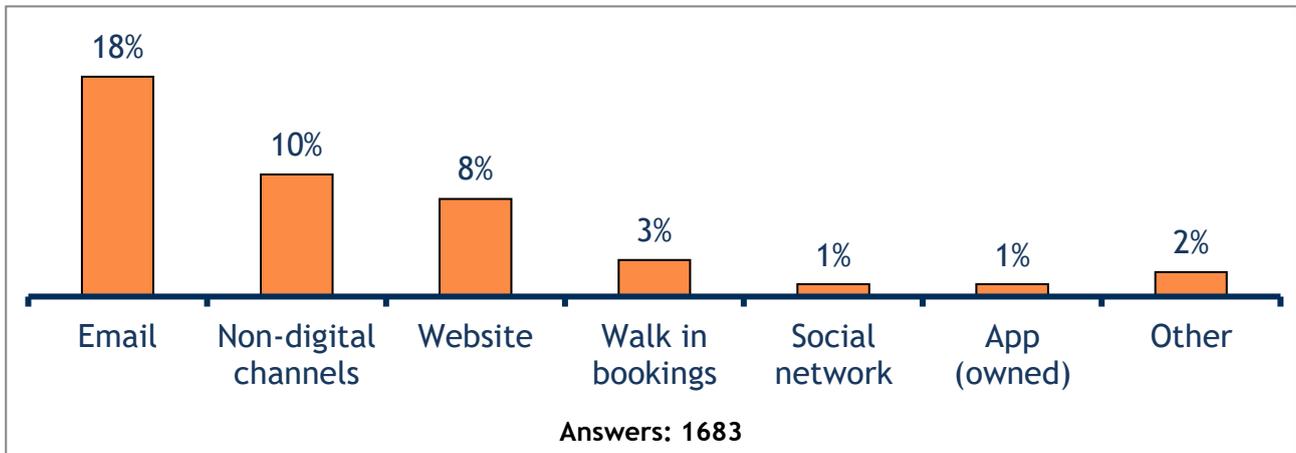
As it can be noticed, the role of online intermediaries is very strong, with OTAs/home sharing portals<sup>109</sup> representing 35% of the total bookings. Moreover, from the Graph 1 it is also possible

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<sup>109</sup> Home sharing portals can be defined as OTAs of rental vacation; so, the term “OTA/Home sharing portals” of the graph has to be intended as OTA if the respondent is an hotel, a bed and breakfast and so on or home sharing portal if the respondent is someone renting a house or an apartment.

assessing the low impact of “traditional” travel agencies, which only represent the 7% of the total bookings.

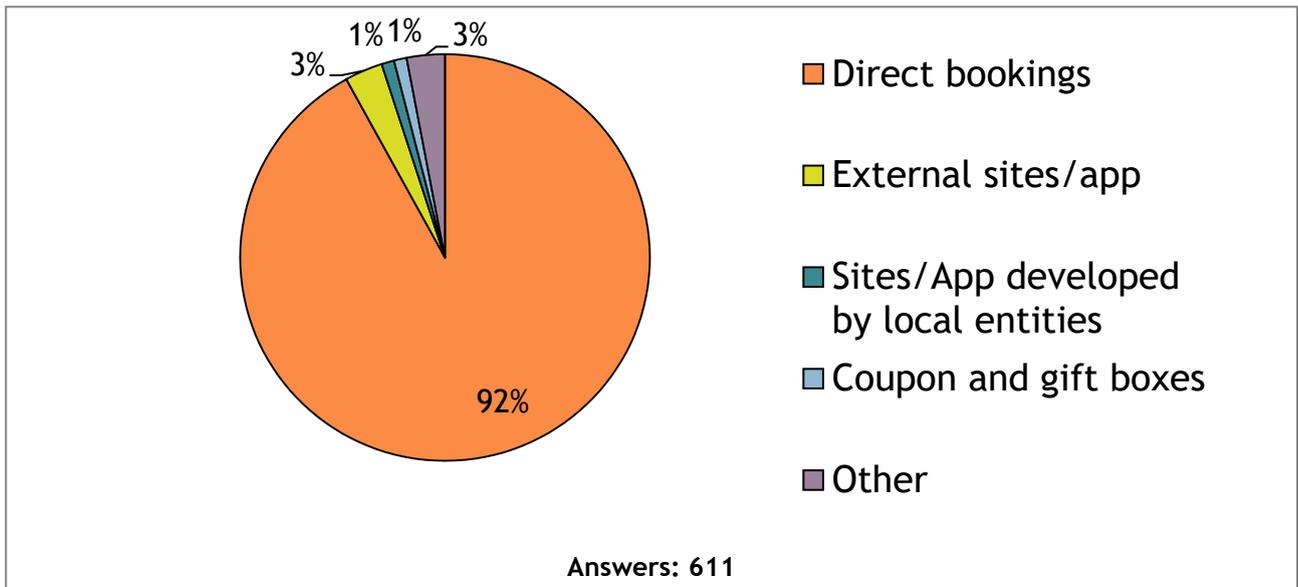
Going more in dept into the percentage of direct channels, the 43% is split as showed in Graph 19.



*Graph 19: subdivision of the percentage of direct booking of accommodation facilities*

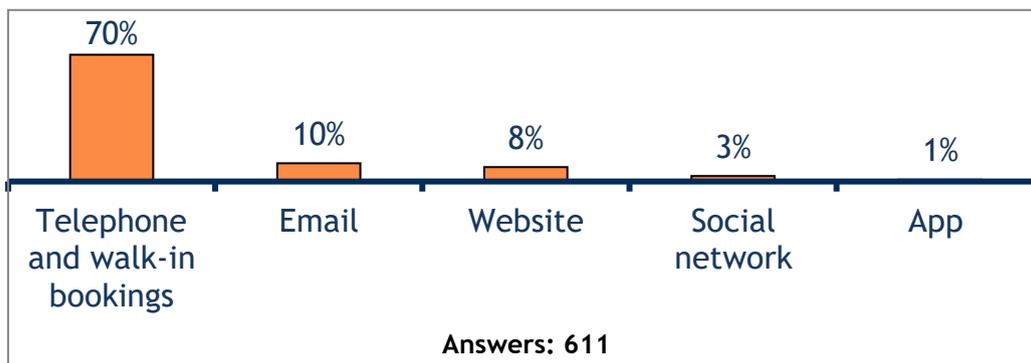
Also, for the direct bookings, digital channels result dominant, driven by email (18%) and website (8%). On the other side, the role of social networks and apps in booking looks marginal. As a consequence, it arises a market of Italian accommodation facilities very dependent on online channels and very impacted by online intermediaries.

A completely different situation is the one involving the respondents of the survey about restaurant activities. In Graph 20 it is possible seeing the channels from which customers make the reservation of a table and, as it can be seen, the role of intermediaries is minimum, with only the 8% of booking coming from them.



Graph 20: booking channels of restaurant activities

Moreover, from Graph 21 emerges that most of direct bookings come from telephone or from the customer directly coming to the place (walk-in bookings).



Graph 21: subdivision of the percentage of direct bookings of restaurant activities

So, a first consideration is that accommodation facilities and restaurant activities present very different characteristics in the booking channels: the former are very impacted by the digital ones - both direct and with the involvement of a third party - while the latter are not very dependent on intermediaries and the direct bookings still depend a lot on traditional “solutions” (e.g. telephone).

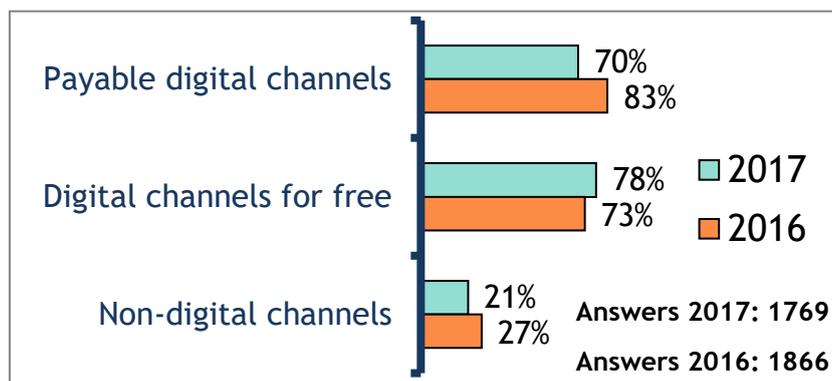
## Promotion of direct channels

As the first chapter wanted to give an insight of the different channels from which hospitality industry providers receive bookings, this one is aimed at analysing the promotion activities that can be exploited to improve the direct ones. Basically, the objective is to present how the impact of direct

bookings and of indirect ones, may vary depending on the promotion activities made by the respondents. The analysis follows three steps: firstly, the accommodation facilities answers are analysed, then the investigation will move to restaurant activities and finally the main conclusions about the scenario that has emerged will be presented.

### *Accommodation facilities*

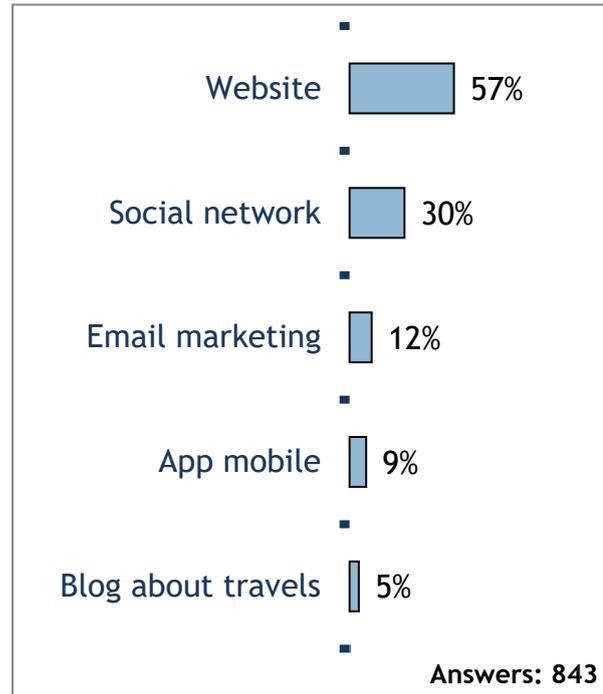
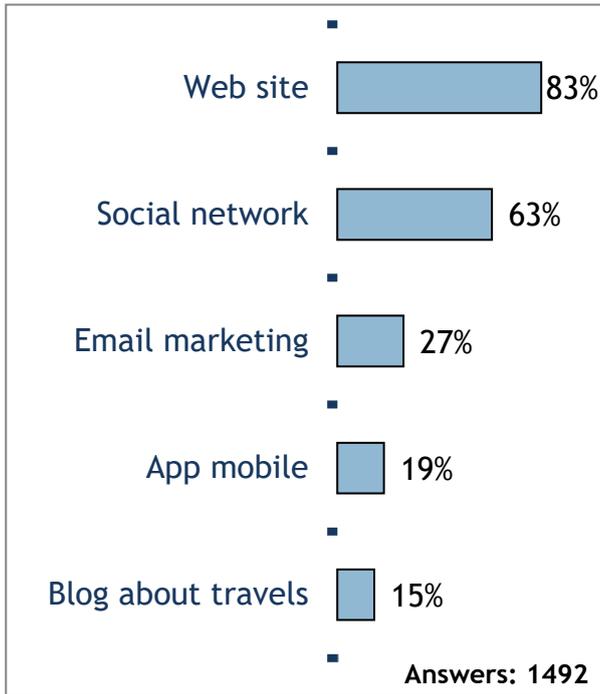
According to the results of the survey, 90% of respondents carries out promotional activities and in particular, it seems that these accommodation facilities are focusing more on digital channels respect to the non-digital ones, which are exploited only by the 21% (Graph 22). It is also possible stating a preference for digital channels which can be used for free against the payable ones (Graph 22). Moreover, comparing this data with the results coming from the survey conducted by the Observatory in 2016, the use rate of payable digital channels was much higher, with a value of 83% against the 73% of the digital channels for free (Graph 22).



*Graph 22: types of channels for the promotion of accommodation facilities (comparison)*

Although it is not possible saying that in one year, Italian accommodation facilities has completely transformed their way of doing promotions, some assumptions can be done. The increased importance for free digital channels assessed in 2017 survey, could represent a signal that Italian accommodation facilities are going to focus a lot of their effort on the creation of contents on their own online channels, in order to try to create traffic and bookings with no intermediation. In particular, going more in depth in the analysis of free digital channels, website and social network resulted as the most diffused and they are preferred over: email marketing exploiting the company’s database (27%), app

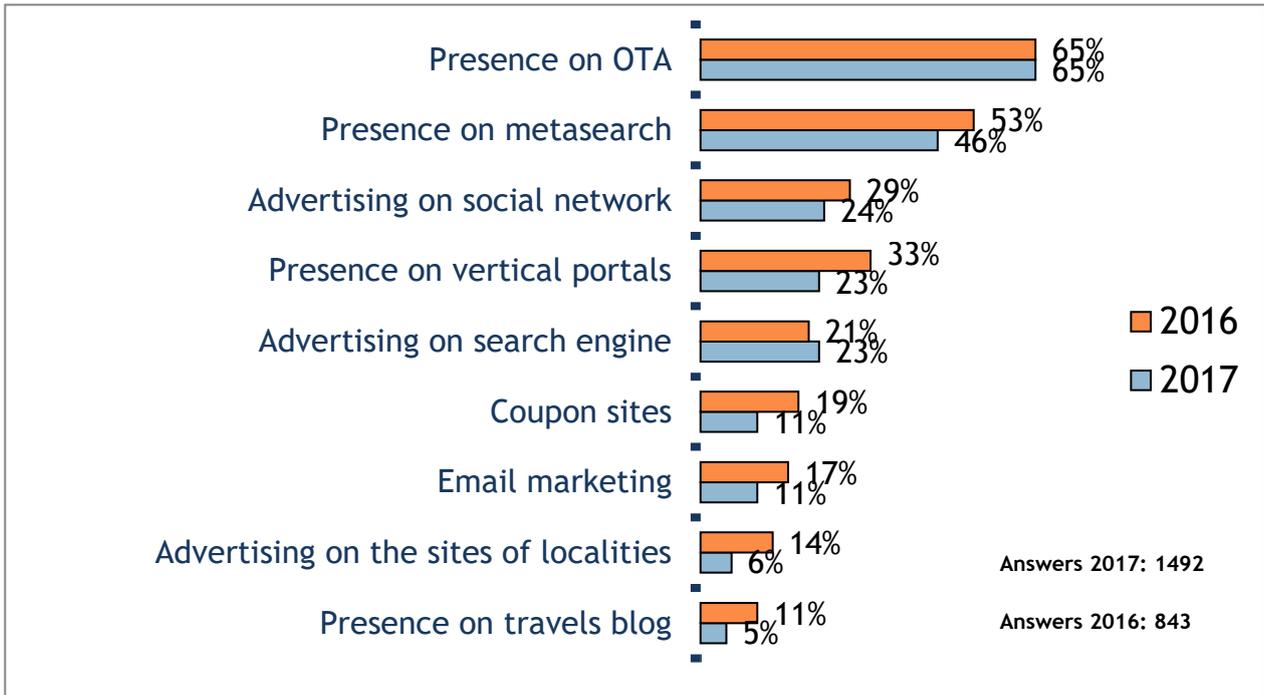
mobile (19%) and blogs about travels (15%) (Graph 23). Moreover, these channels are considered the most effective between the free ones (Graph 24).



*Graph 23: use of different free digital channels*

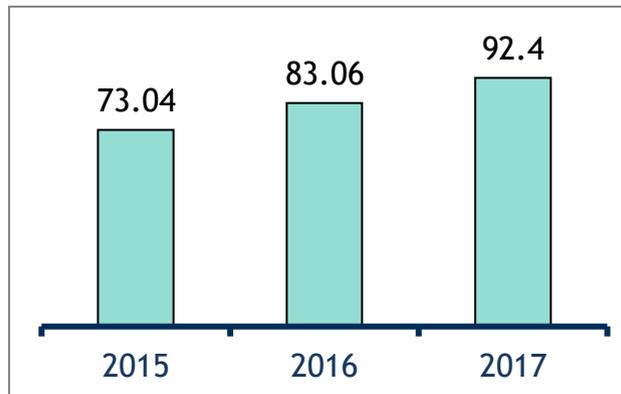
*Graph 24: effectiveness of different free digital channels*

In order to incentive the use of these channels accommodation facilities may carry out different strategies. First of all, it is important talking about the use of advertising on search engines and on social networks with the purpose of generating traffic. These practices are not very used by the respondents of the survey, that tend to prefer OTAs and metasearch (Graph 25). Moreover, respect to the previous year, the use of advertising on search engine has slightly increased of 2 percentage points, while advertising on social network decreased of 5 percentage points (Graph 25).



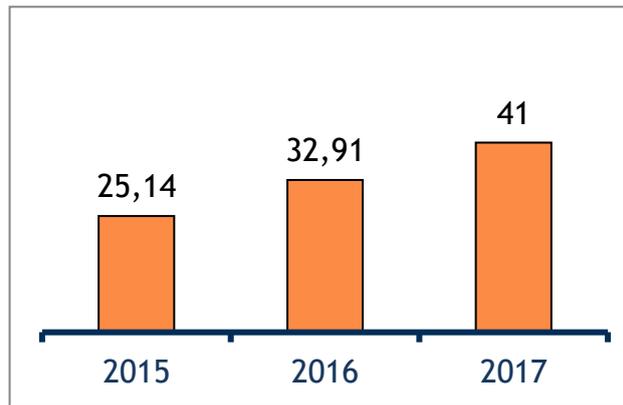
Graph 25: use of the different type of payable channels (comparison)

The slight increase in the use of search engine advertising (SEA) is in line with the trend that is seeing this market keeping on growing worldwide, as showed in Graph 26; on the other side the decrease in the use of social network advertising is in countertendency with the worldwide trend showed in Graph 27.



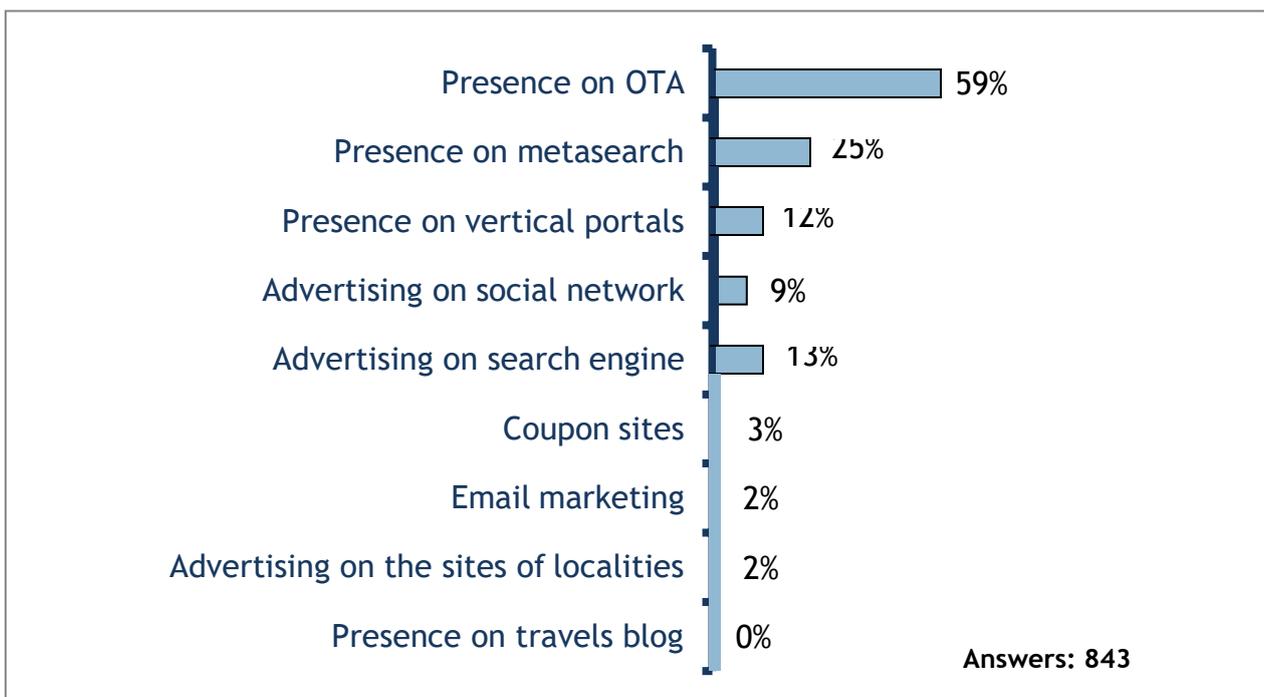
Graph 26: worldwide search engine spent in billions of US dollars<sup>110</sup>

<sup>110</sup> Source: Statista



Graph 27: worldwide social network advertising in billions of US dollars<sup>111</sup>

The reason of the low use rate of these activities can be the fact that only few respondents consider them effective (Graph 28). Anyway, it is important considering that for having more benefits from these actions, it could be useful to implement more comprehensive strategies



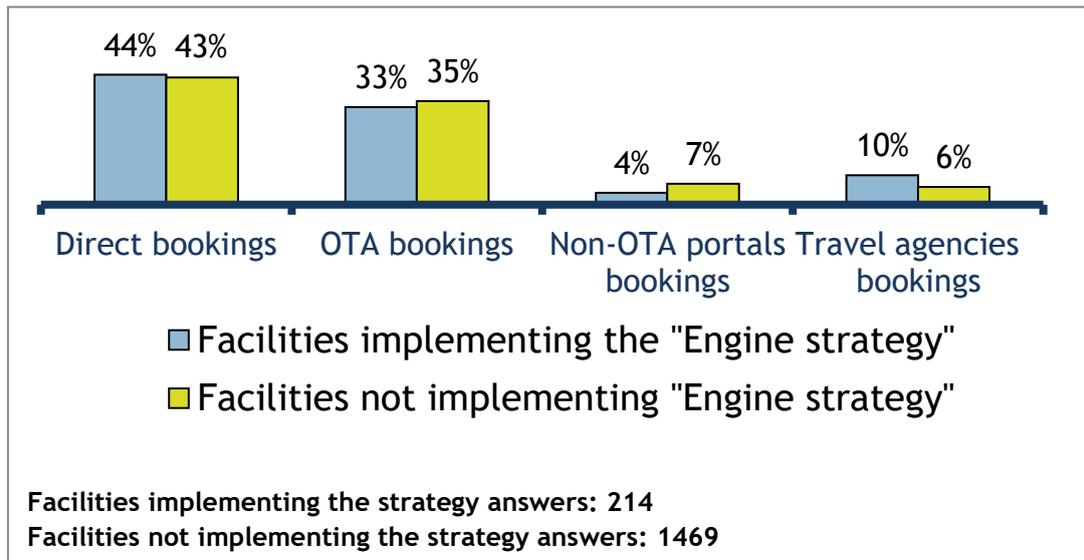
Graph 28: effectiveness of the different type of payable channels

Let us start with advertising on search engine; only the 65%<sup>112</sup> of respondents making this form of advertising also has a system for online booking, which allows customer to control rooms availability and compare fares (i.e. a book engine). This tool can be very useful because: while advertising helps

<sup>111</sup> Source: Statista

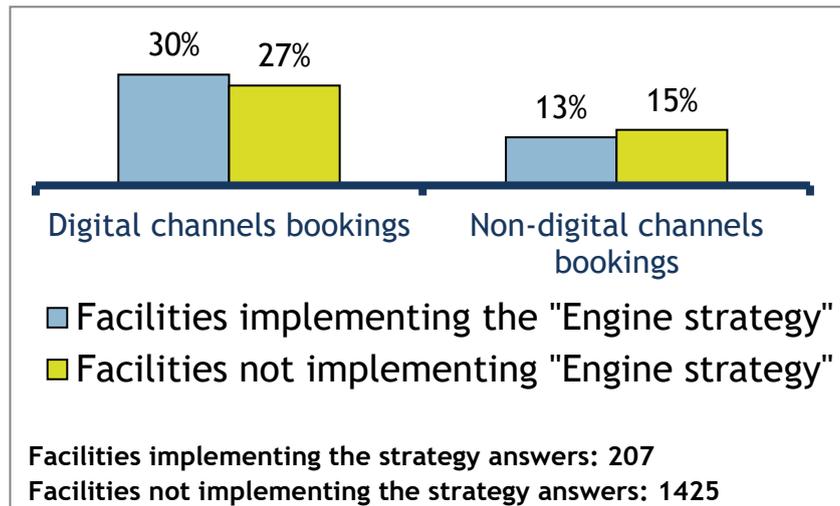
<sup>112</sup> Answers considered: 329

to create traffic, the book engine can transform this traffic into bookings; so, a strategy combining these two instruments (let us call it “Engine strategy”) may increase direct bookings. However, comparing the respondents carrying out this strategy with the others, it emerged that the formers do not have a significant increase in the portion of direct bookings (only +1 percentage point) (Graph 29). Nevertheless, it is possible assessing that the respondents implementing the Engine strategy have less portion of bookings involving online intermediaries and more coming from traditional travel agencies (Graph 29).



Graph 29: booking channels (comparison of website strategies)

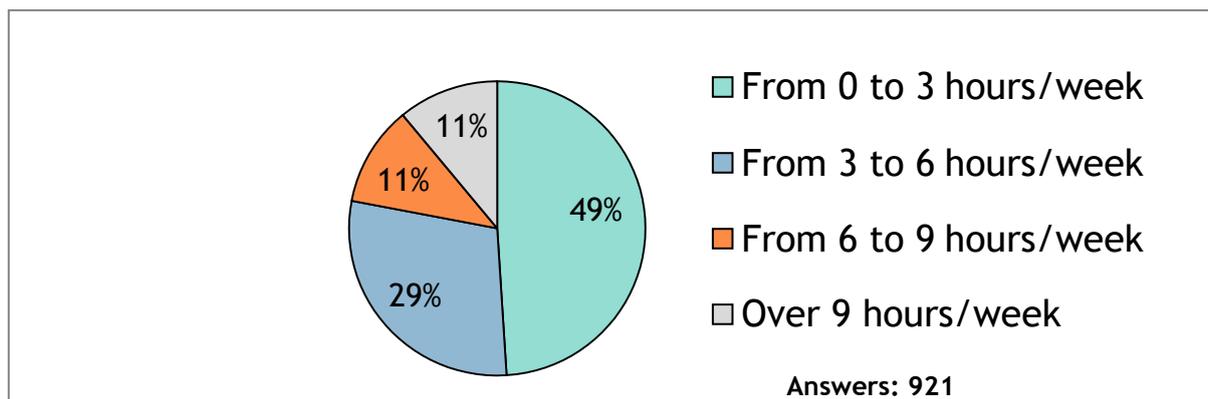
Moreover, considering direct bookings, the respondents implementing the Engine strategy tend to have higher percentage of bookings coming from digital channels, but lower coming from non-digital ones (Graph 30).



Graph 30: types of direct booking channels (comparison of website strategies)

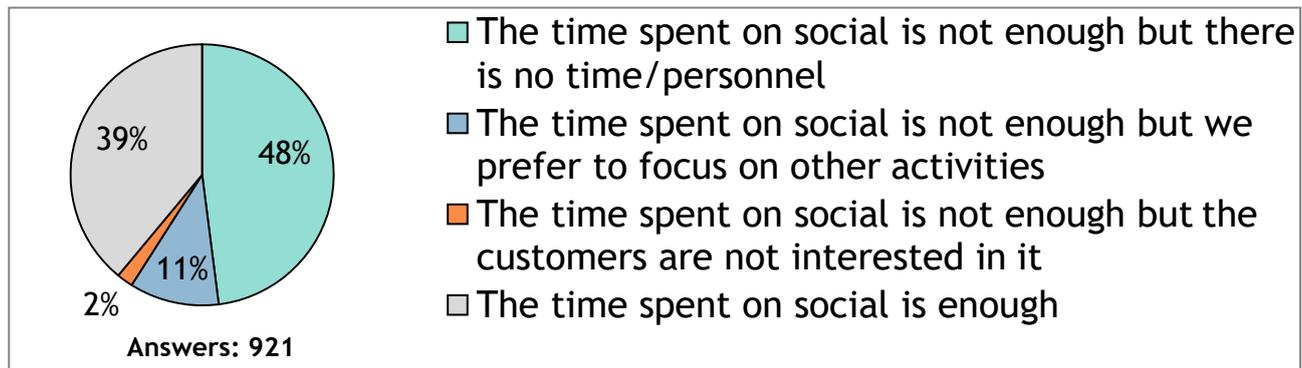
As a consequence of these data, it is possible conjecturing that the Engine strategy may be an effective way for reducing the dependency on online third parties – as seen in Graph 29 – and it might also increase the direct bookings from digital channels. Anyway, the Engine strategy seems to be correlated with a slight decrease in direct bookings from non-digital channels, so, in order to assess a relevant increase in the overall direct bookings, it is important not forgetting about offline channels.

Considering now advertising on social network, it is possible making similar considerations: in order to increase direct bookings, the advertising alone is not enough, it is important being present and continuously active on the best social networks for promotion activities. Although there are many respondents that have an account on social networks, only the 51% of them spends more than 3 hours/week monitoring them (Graph 31).



Graph 31: hours per week spent on social networks

However, the problem is not that Italian accommodation facilities are not aware of the importance of these channels, but that most of them do not have the time/personnel to dedicate (Graph 32).

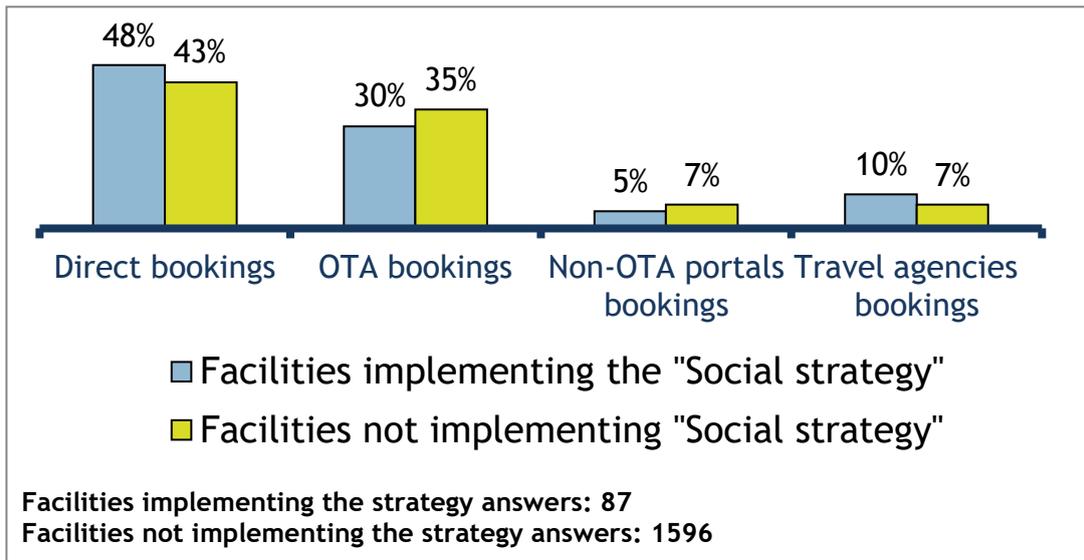


*Graph 32: opinion about the time spent on social networks*

Moreover, accommodation facilities should consider that social networks like Instagram and Pinterest, where the role of images and photos is fundamental, can become crucial in the touristic promotion, as stated by Valentina Tanzillo<sup>113</sup> at Be-Wizard 2017: “There is not only Facebook. If an hotel wants to exploit the power of visual story telling should not leave out Instagram and Pinterest”<sup>114</sup>. For all these reasons, it was made a comparison between respondents implementing a strategy involving advertising on social networks, spending more than 6 hours/week on this channel and being present on Instagram and/or Pinterest (let us call it “Social strategy), against all the others. The results showed that those implementing the Social strategy have more proportion of direct bookings (+5 percentage points) and less bookings coming from online intermediaries; although the bookings coming from travel agencies are higher respect to the others (+3 percentage points) (Graph 33).

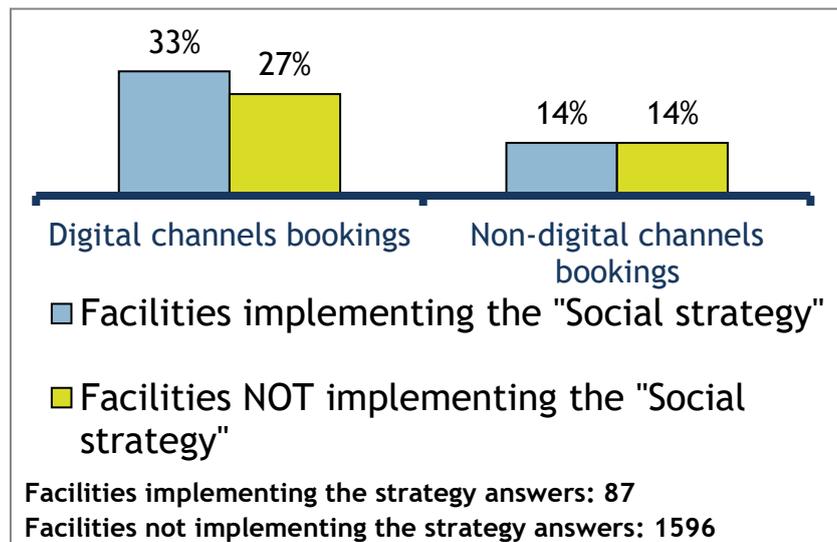
<sup>113</sup> Social Media Specialist and Visual Storytelling Instructor

<sup>114</sup> Di Cesare C. (2017) Hotel, per vendere con i social non c’è solo facebook. TTG Italia



Graph 33: booking channels (comparison of social network strategies)

It is possible stating that a proper management of social network mixed with the use of advertising may be very effective; in fact, having a look to the direct bookings of those using this approach, it is possible assessing that bookings from digital channels are higher of 5 percentage points (Graph 34).



Graph 34: direct booking channels (comparison of social network strategies)

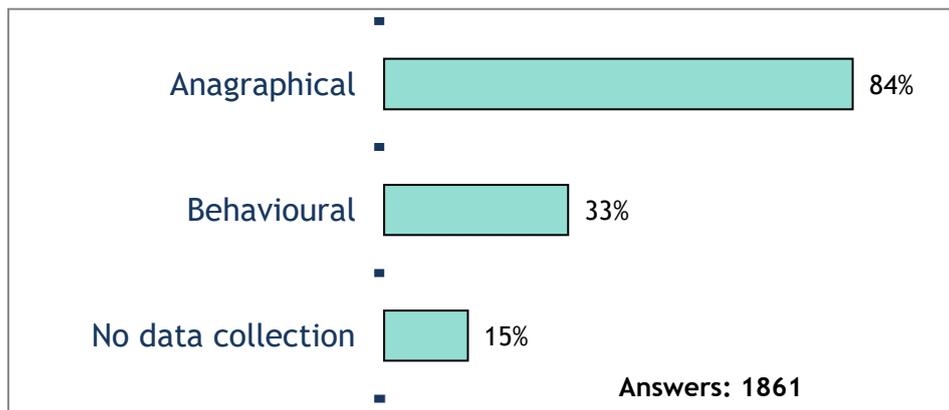
At this point it is possible making a first important consideration about the advertising on search engine and on social networks. According to the results of the survey, these activities are not considered very effective and the reason is that they cannot be “stand alone” solutions, but should be supported by other activities, like the continuous monitoring of the channels. Moreover, it is important not forgetting that the performances of direct bookings are not only linked to online channels but also

to the offline ones: so, it is useful to implement strategies aimed at improving online channels without giving less attention to relevant offline ones.

Another way that accommodation facilities have to increase bookings through direct channels is the exploitation of data and information about customers. These may represent a source of competitive advantage, since they allow:

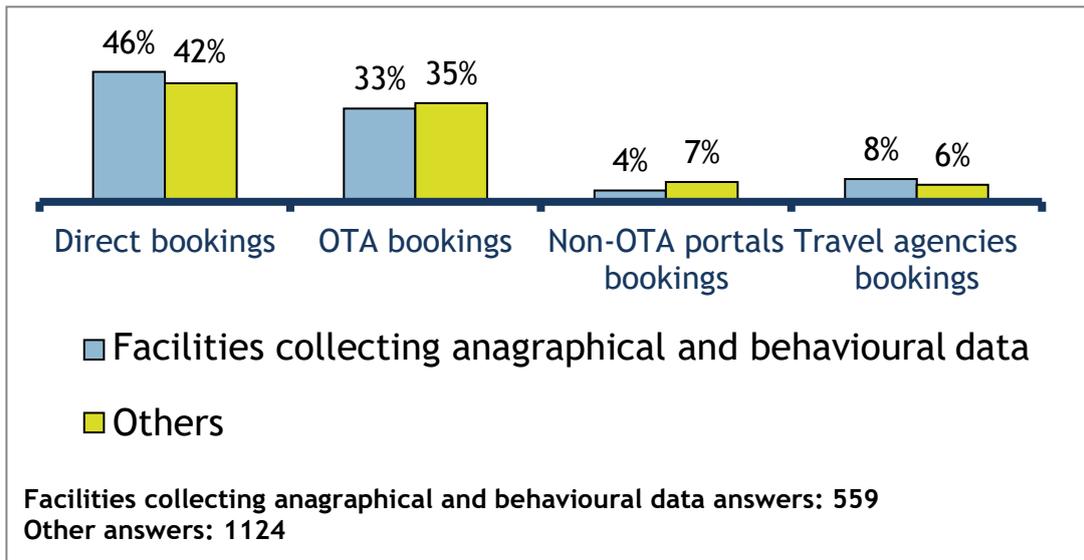
- To make more effective promotion. For instance, if a facility is organising a traditional dinner based on typical local products on a certain week end, it could invite all the past guests that have interest in food and cooking.
- To better understand the market and the customers. For example, if a facility has a lot of customers asking for a guided tour in the local museum, this service could be offered to them before the arrival.

Most of the respondents focus on the collection of anagraphical data, ignoring the importance of behavioural one (Graph 35).



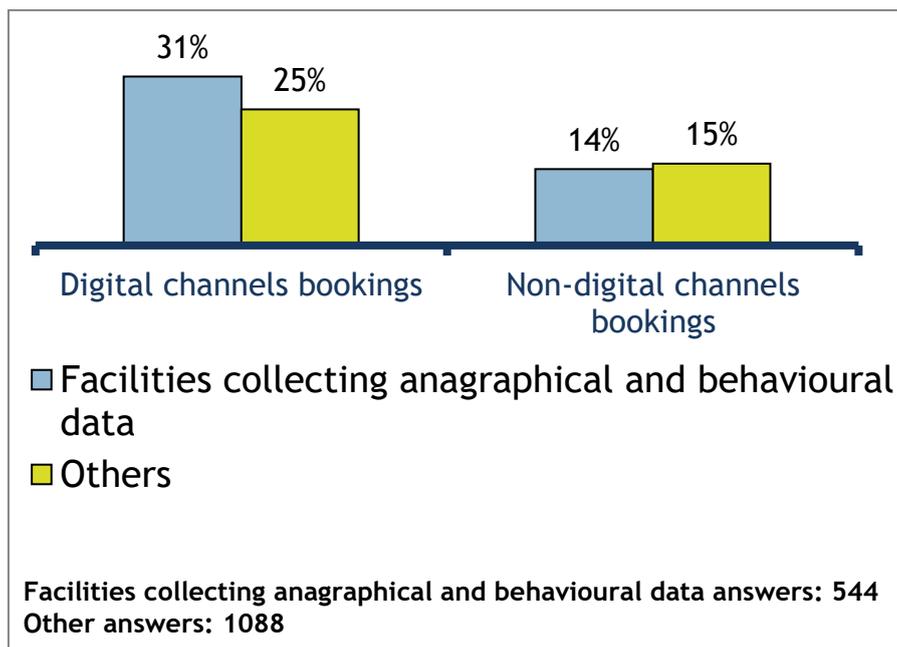
*Graph 35: data collected about past guests*

Thanks to behavioural data it is possible reaching the advantages mentioned above – effective promotions and understanding of the market – and in fact, respondents combining the collection of anagraphical data with the collection of behavioural data have more portion of direct bookings (+4 percentage points) and less portion of bookings from OTAs and other non-OTA portals; although they have more portion of bookings from travel agencies (Graph 36).



Graph 36: booking channels (comparison of data strategies)

Furthermore, these facilities have high percentage of bookings coming from digital direct channels (+6 percentage points) despite a slight lower portion of bookings from direct offline channels (Graph 37).



Graph 37: direct booking channels (comparison of data strategies)

It is possible assuming that their good performances are linked to a good exploitation of the collected information; in fact, the group made of all these facilities presents these characteristics:

- Higher attitude in communicating with customers<sup>115</sup>: 74% of the facilities sends communication toward customers before their arrivals; if we consider all the respondents of the survey the percentage is 68%.
- Higher attitude in offering additional services<sup>116</sup>: 39% of the facilities offers upgrade or additional services against the 27% of the whole survey's respondents.
- Higher attention for past guests<sup>117</sup>: 64% of the facilities make commercial activities toward people already host in the past against the 43% of the whole survey's respondents. Moreover, in the 43% of the cases the communication is personalized while considering all the respondents the percentage is 36%.
- Higher use of CRM software<sup>118</sup>: 34% of the facilities use a CRM solution against the 19% of the whole survey's respondents.

Finally, in this section, three different strategies for enhancing online direct channels have been investigated - Engine strategy, Social strategy and a strategy that combines the collection of anagraphical and behavioural data – with the purpose of showing that comprehensive approaches may provide benefit in terms of direct bookings and disintermediation. However, in the respondents applying the different strategies has always emerged a tendency of reduction in the percentage of bookings coming from offline direct channels (e.g. bookings from telephone). Probably, these strategies make accommodation facilities become too focus on online channels with the risk of disregarding some offline instruments, like leaflets or manifests.

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<sup>115</sup> Data about facilities collecting anagraphical and behavioural information correspond to 598 respondents, while considering the whole survey the number of respondents is 1823

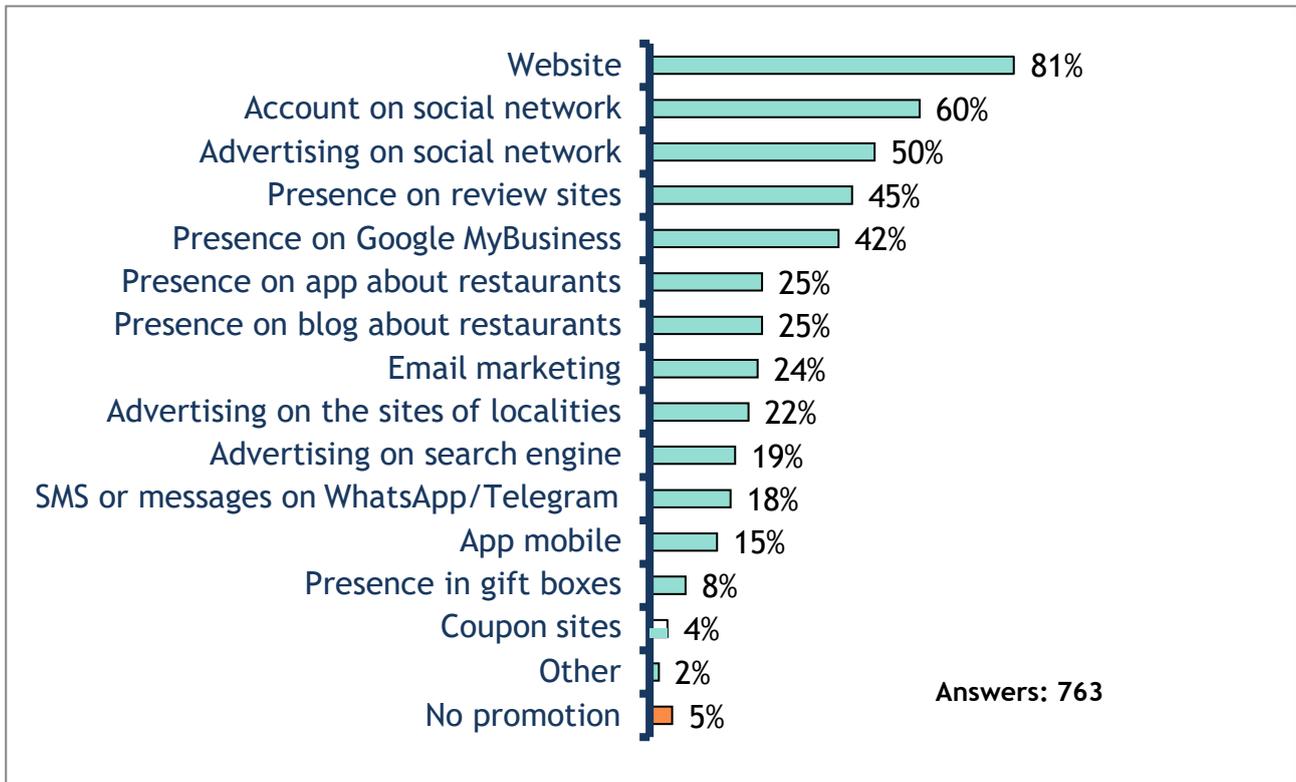
<sup>116</sup> Data about facilities collecting anagraphical and behavioural information correspond to 597 respondents, while considering the whole survey the number of respondents is 1824

<sup>117</sup> Data about facilities collecting anagraphical and behavioural information correspond to 591 respondents and it drops to 379 if we consider the type of communication (personalised against standardized), while for the whole survey the number of respondents is 1803 and it decreases to 764 if we consider the type of communication

<sup>118</sup> Data about facilities collecting anagraphical and behavioural data correspond to 513 respondents, while considering the whole survey the number is 1503

## *Restaurant activities*

Also in the survey involving restaurant activities has emerged an high use rate of website and social network accounts, with respondents very active in the use of advertising on social networks but less interested in the use of advertising on search engine (Graph 38).



*Graph 38: channels and activities for promotion*

Similarly to what was done for accommodation facilities, the possible comprehensive strategies that may improve these channels will be analysed and discussed.

Let us start considering the activities involving the website. In recent years the traffic from mobile and tablet has become more and more relevant and on October 2016 reached the traffic from desktop (Figure 3).

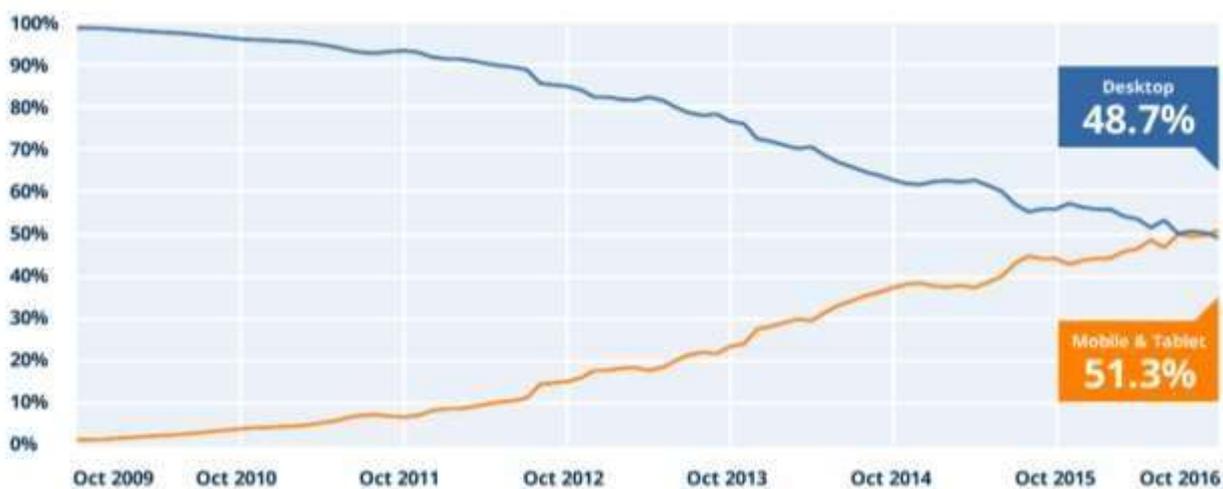


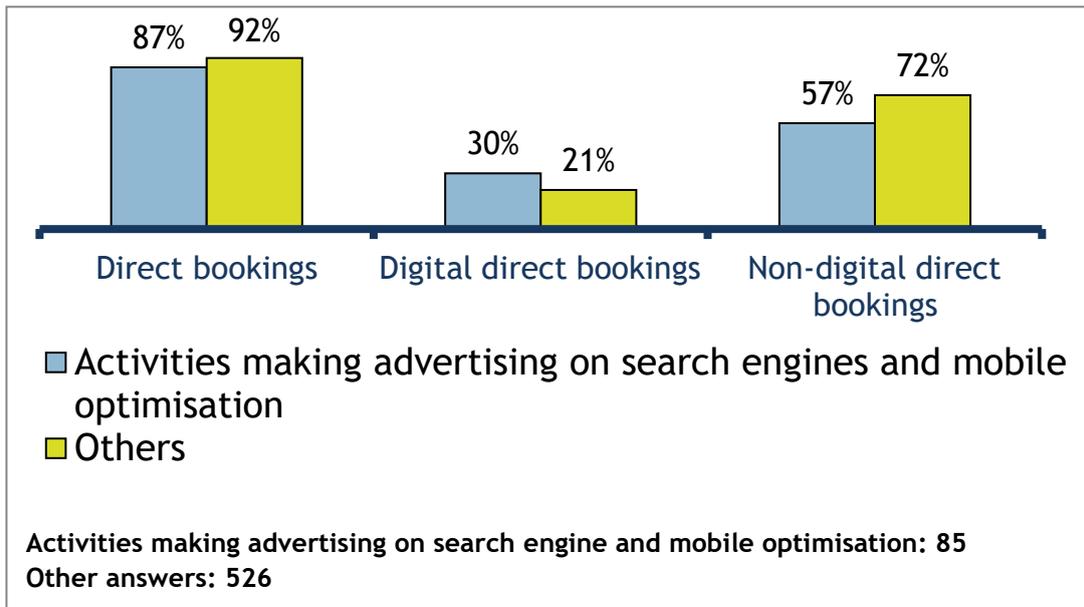
Figure 3: desktop traffic and mobile & tablet traffic over time

Restaurant activities should take this trend into consideration, because not optimising the website for tablet and smartphone may give a poor experience to the users. Most of the respondents are aware of this and in fact, the 77%<sup>119</sup> has made it, representing an increase of 3 percentage points respect to the previous year<sup>120</sup>. Moreover, considering activities making advertising on search engine, the percentage of mobile optimisation rises to 83%<sup>121</sup>. Anyway, looking at the portion of direct bookings coming from direct channels, it seems that those making advertising on search engine and optimisation of the website for mobile has worse performances (Graph 39). Nevertheless, going more in dept into direct bookings it is possible stating that those implementing this comprehensive strategy, have improved their own digital channels (e.g. walk-in bookings or by telephone), although the portion of offline channels have decreased (Graph 39).

<sup>119</sup> Answers considered: 600

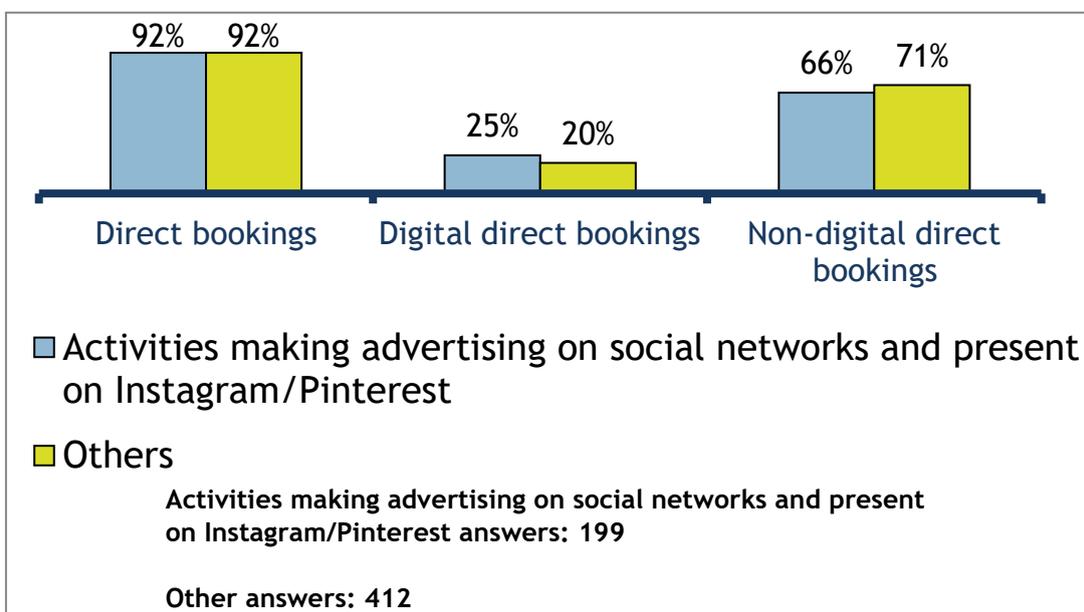
<sup>120</sup> 2016 answers considered: 286

<sup>121</sup> Answers considered: 123



Graph 39: direct bookings (comparison of website strategies)

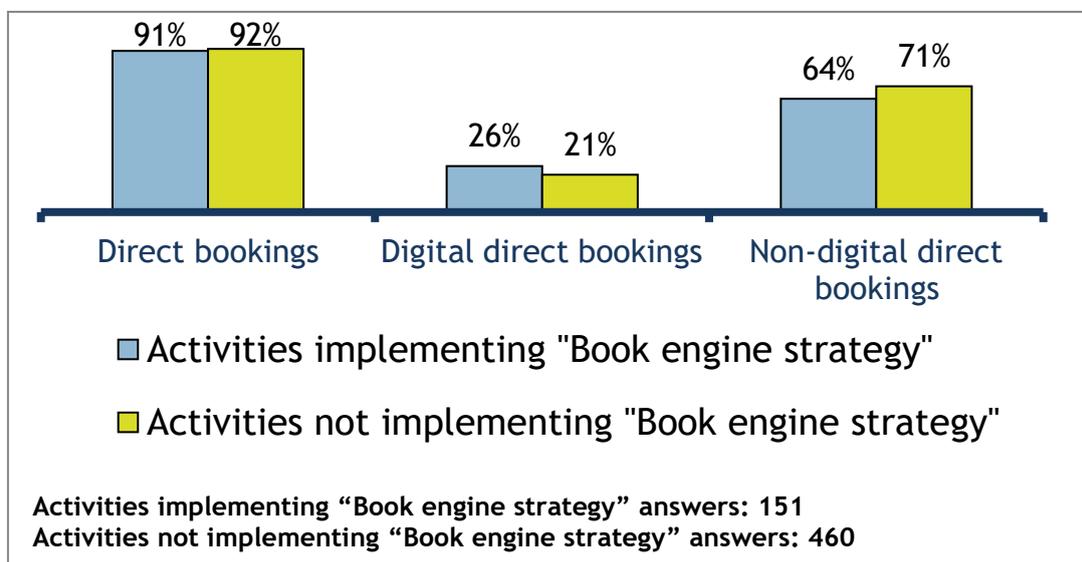
Considering now social network and making an analysis similar of the one done for accommodation facilities; it was made a comparison between facilities making advertising on social network and being present on Instagram and/or Pinterest against the others. Again, this comprehensive strategy does not seem to increase the portion of direct bookings, although direct digital channels looks improved (Graph 40).



Graph 40: direct bookings (comparison of social strategies)

Another way to improve online direct channels is to accept bookings from website (even with book engine), from the application of the restaurant activity or from social networks. So, it was analysed a

strategy involving the acceptance of bookings from one of these channels mixed with the use of advertising – no matter if on search engine or on social –. Again, those implementing this strategy (let us call it “Book engine strategy”) does not have a significant change in the portion of direct bookings, but they are able to improve their own online channels (Graph 41)



*Graph 41: direct bookings (comparison of book engine strategies)*

So, in general also for restaurant activities, the application of comprehensive online strategies may improve the online channels, but this could negatively affect the attention toward offline ones with the risk of reducing the overall direct bookings. The reason is that all the different strategies require high attention for online activities and in fact, looking at the restaurant activities implementing them, gives the following results:

- The percentage of respondents implementing a strategy that includes advertising on search engine mixed with optimisation of the website for mobile/tablet strategy, and that spends more than 6 hours/week on digital channels is 23%<sup>122</sup> against the 17% of the whole sample<sup>123</sup>.
- The percentage of respondents implementing a strategy that includes advertising on social network mixed with the presence on Instagram/Pinterest, and that that spends more than 6 hours/week on digital channels is 27%<sup>124</sup> against the 17% of the whole sample.

<sup>122</sup> Answers considered: 96

<sup>123</sup> Answers considered: 607

<sup>124</sup> Answers considered: 226

- The percentage of respondents implementing Book engine strategy and spending more than 6 hours/week on digital channels is 25%<sup>125</sup> against the 17% of the whole sample

Thus, the application of one of the different strategies by restaurant activities seems to be correlated with higher time spent on digital channels.

## *Conclusion*

There are several online instruments and activities, that may give support in the promotion of hospitality industry providers and they can help to reduce the dependency on online intermediaries and to improve direct channels; but to fully exploit these opportunities, it is important having a well-defined strategy. In fact, some activities (e.g. advertising on social network for accommodation facilities) may not be perceived very effective because they are not integrated in a more comprehensive approach. In this part, different strategies were introduced and it was shown that they can really give support to online direct channels.

Moreover, companies applying these strategies should dedicate a lot of time to online channels but not forget about the importance of offline ones; especially in the restaurant activities market, where it looks like the demand is still very related to offline solutions (as seen in the previous chapter). Not losing the focus on offline activities is crucial, because in several cases it resulted that respondents that has implemented one of these strategies has a lower percentage of bookings from offline owned channels and higher from offline intermediaries (e.g. travel agencies).

## Digital technologies for the management of operations

The main purpose of this part is the understanding of what are the most diffused technologies for the management of the internal operations, among the actors of the Italian hospitality industry, trying to focus on those that may affect not only internal performances, but also improve the knowledge about the market and so, maybe also direct bookings.

First of all, it is important underlying that the 80% of accommodation facilities respondents<sup>126</sup> has introduced at least one digital technology for the management of internal operations, against the 40% of the restaurant activities respondents<sup>127</sup>. The reason behind this difference could be the higher

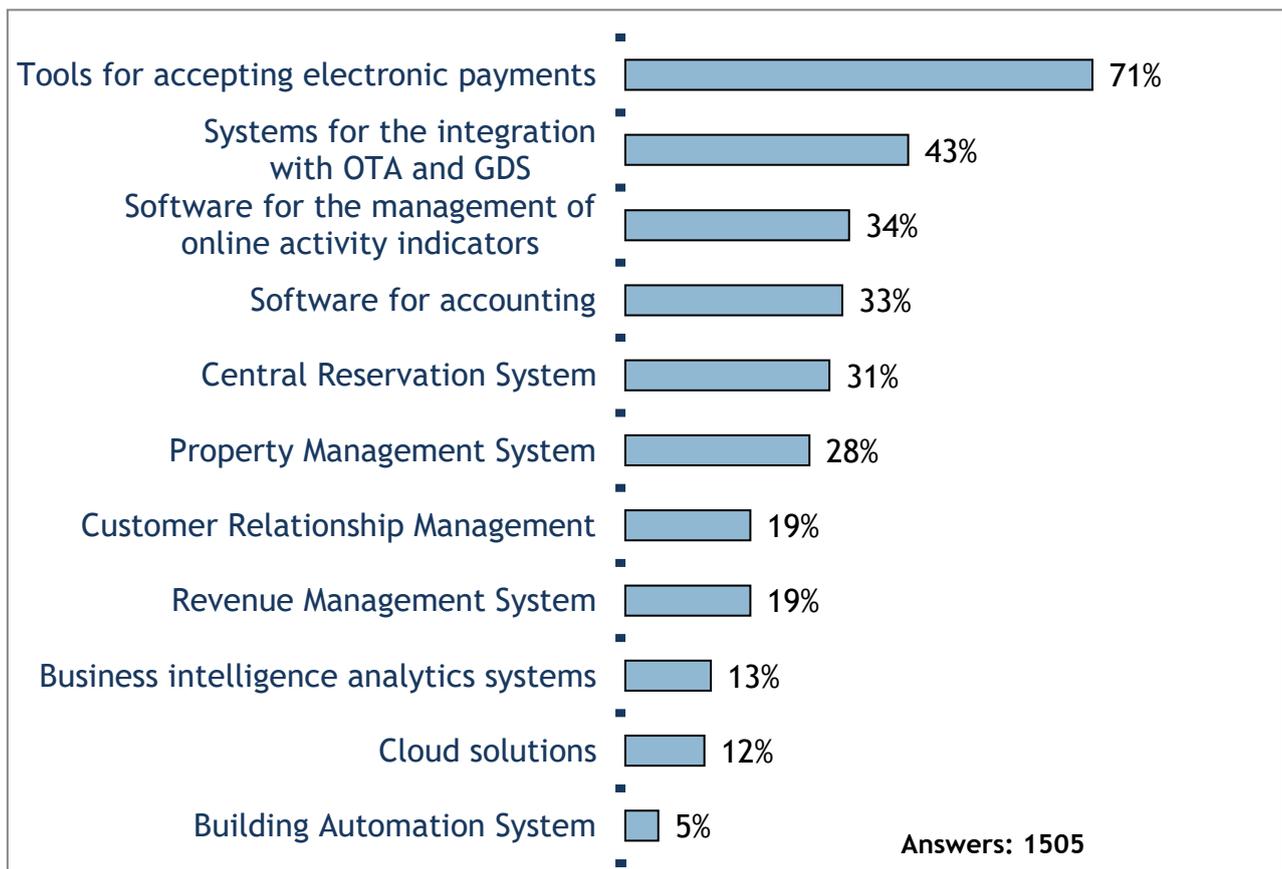
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<sup>125</sup> Answers considered: 161

<sup>126</sup> Answers considered: 1505

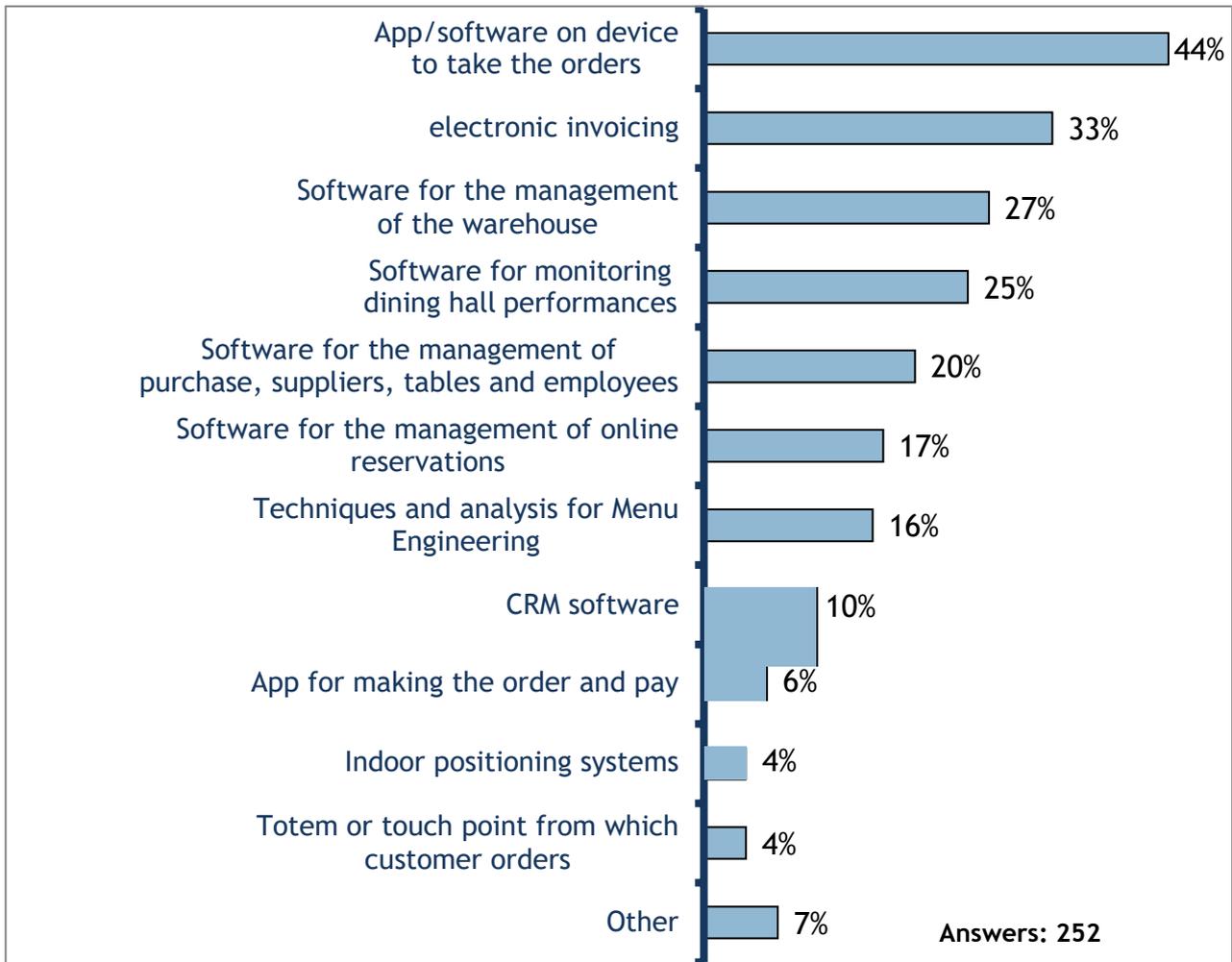
<sup>127</sup> Answers considered: 634

complexity of some accommodation facilities' activities: they have more different operations to manage (check in, check out, cleaning the rooms, in some cases also restaurant activities, and so on) and they deal with more different actors/intermediaries (OTAs, metasearch, travel agencies, ...). So, accommodation facilities have higher need of integration and monitoring; thus, it is not surprising that after payment solutions, the most diffused digital technologies are systems for the integration with intermediaries and software for Web analytics (Graph 42).



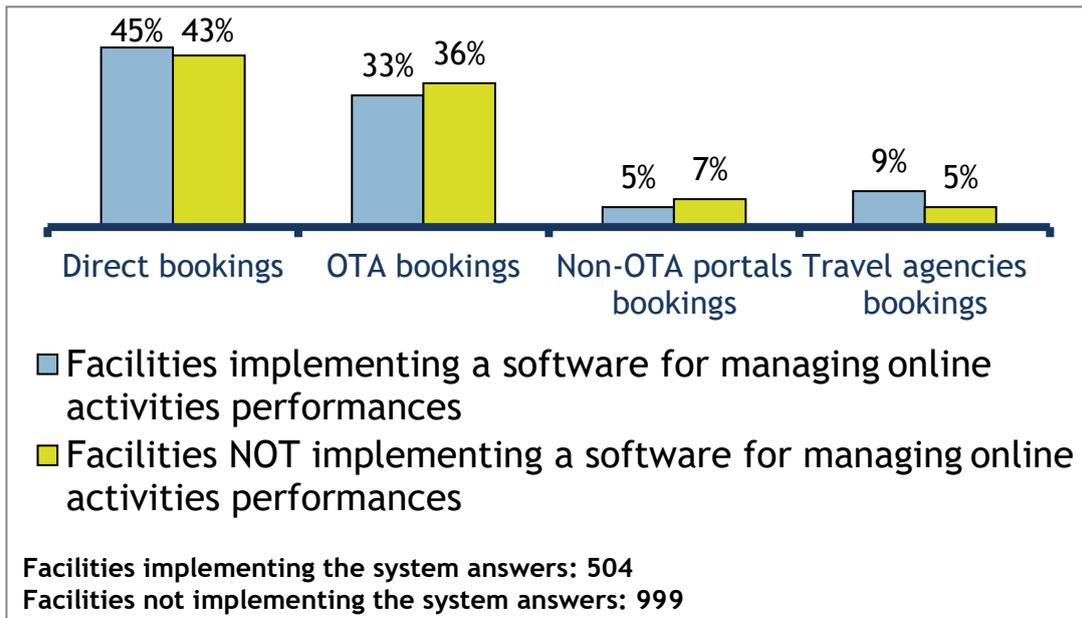
*Graph 42: digital technologies for the management of internal operations introduced by accommodation facilities*

On the other side, restaurant activities respondents, seem to be more oriented towards digital technologies for improving internal performances, respect to those that can improve the relationships with customers (e.g. CRM software or beacons) (Graph 43).

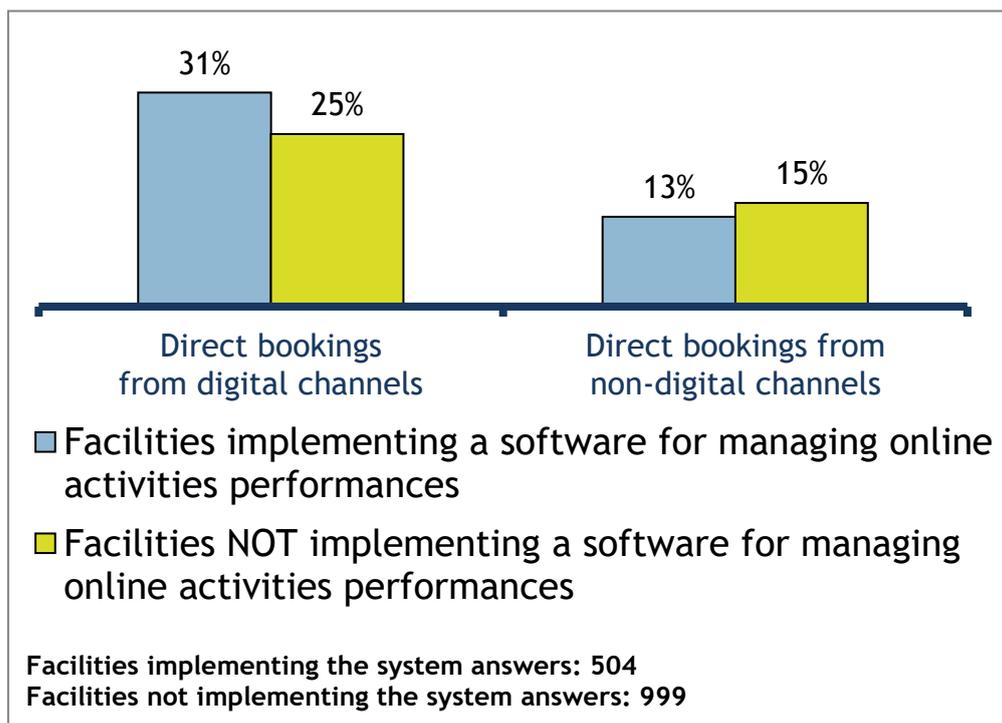


*Graph 43: digital technologies for the management of internal operations introduced by restaurant activities*

In the second section of the research results, several actions and strategies aimed at improving the owned channels (mainly website and social network accounts) were presented and it was also underlined the importance of monitoring them. For this purpose, software for the management of online activity indicators – the third preferred technology of accommodation facilities - can be supportive; in fact, thanks to them it is possible better understanding which actions carrying out in the promotion of the channels. For instance, if an accommodation facility assesses that the advertising on social network is not as much effective as the advertising on search engine, it can decide to transfer part of the budget of the first one to the other. According to the survey results, accommodation facilities implementing this solution seem to have higher percentage of direct bookings (Graph 44) and as it can be expected, the better performance is strictly related to better performances of owned digital channels (Graph 45).



Graph 44: booking channels (comparison of the implementation of a software for managing online activities performances)

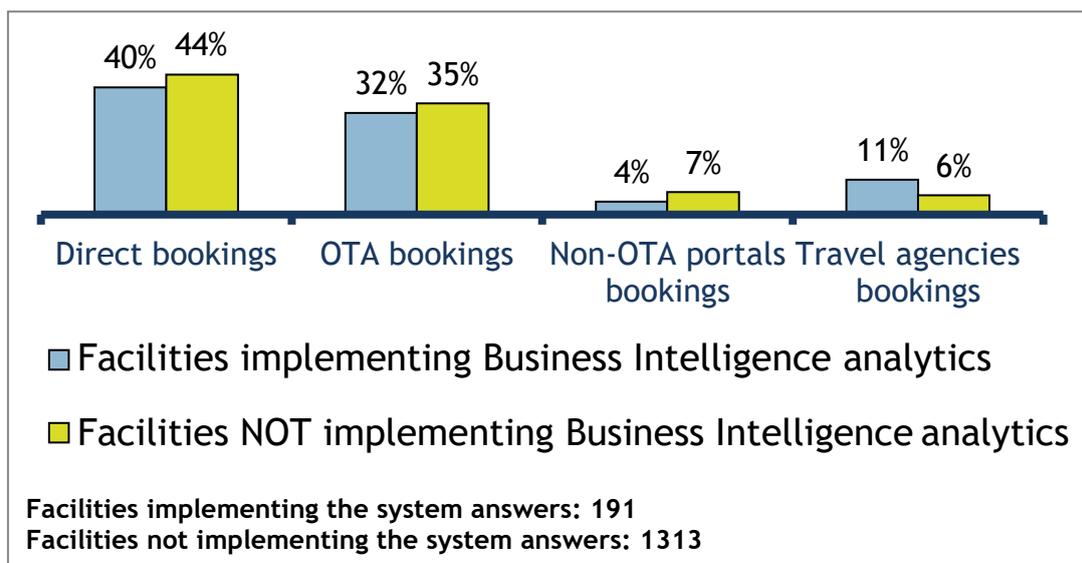


Graph 45: types of direct booking channels (comparison of the implementation of a software for managing online activities performances)

So, these data confirm what just said about the important role that this solution can have in the management and the improvement of owned channels; and it may be useful for accommodation

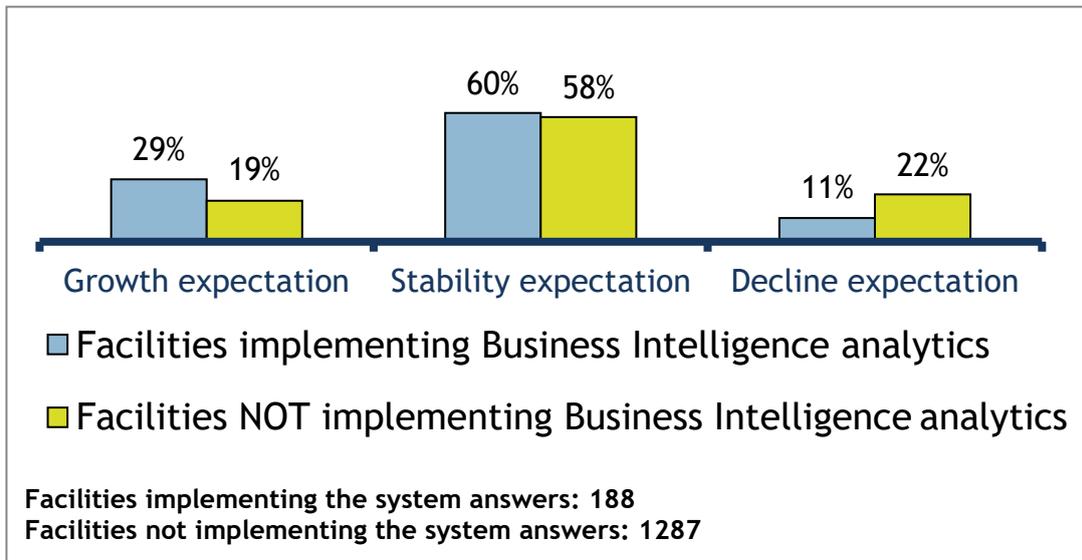
facilities to integrate this tool with the different strategies for promotion presented in the second section of the research results.

On the other side, Business Intelligence analytics systems are exploited only by the 13% of the respondents. Thanks to this tool it is possible exploiting Big Data and transforming them into useful information, that can be exploited to generate bookings or extra-revenues. However, looking at the percentage of direct bookings of those implementing this solution, it is possible assessing that they have worse performances respect to the others, not implementing it (Graph 46).



*Graph 46: booking channels (comparison of the implementation of Business Intelligence analytics)*

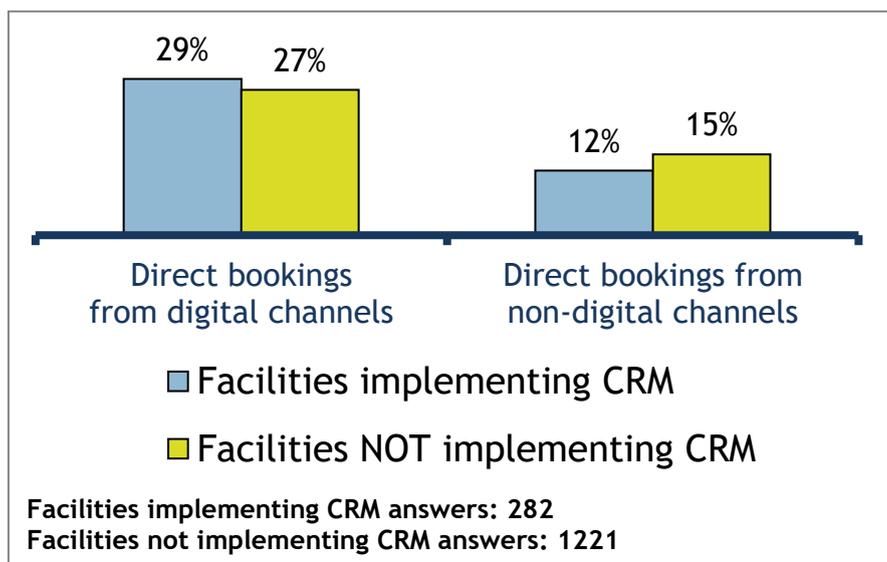
Anyway, the facilities implementing Business Intelligence analytics, seem to have better expectations for the overall revenues of 2017: 29% of them has foreseen a growth of it (Graph 47).



Graph 47: expectation for 2017 overall revenues (comparison of the implementation of Business Intelligence analytics)

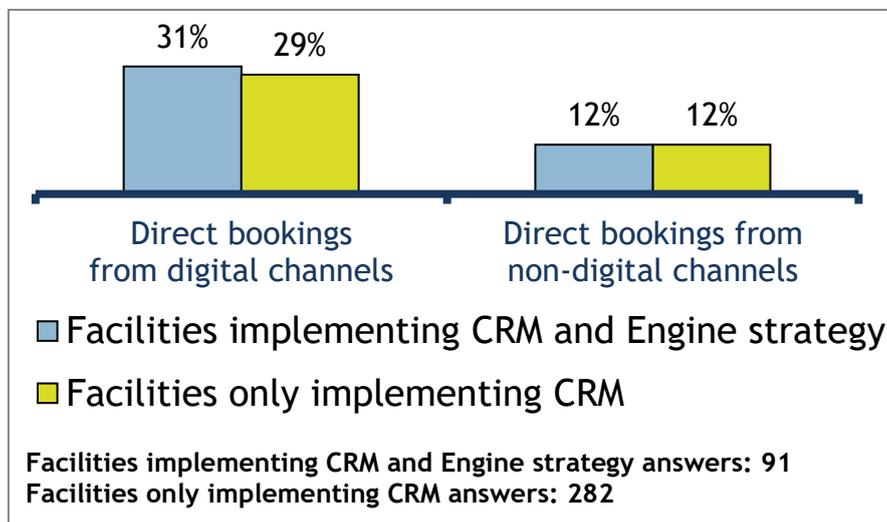
As a consequence, it is possible assuming that for Italian accommodation facilities, the use of Business Intelligence methodologies is not related to higher performance of direct bookings, but it could be more correlated to better performance in terms of revenues. For instance, this solution can be useful for the definition of the optimal price.

Let us now consider CRM, an instrument that is not very diffused in both accommodation facilities and restaurant activities; the accommodation facilities implementing it seems to have only a slight increase in the portion of direct bookings from online channels (Graph 48)



Graph 48: types of direct booking channels of accommodation facilities (comparison of the implementation of CRM)

However, matching CRM with other promotion activities and strategies, can be determinant for a further improvement of the owned channels; in fact, those implementing the Engine strategy - presented in the second section - and CRM gets higher percentage ok bookings from online owned channels (Graph 49).

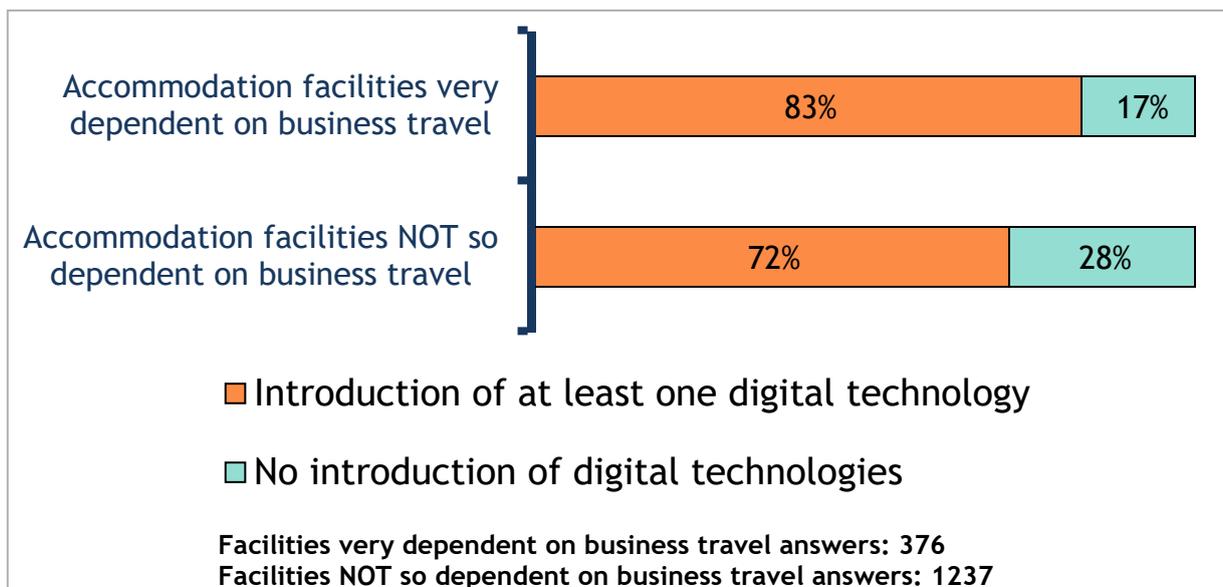


*Graph 49: types of direct booking channels of accommodation facilities (comparison of the implementation of CRM matched with the Engine strategy)*

In conclusion, the Digital revolution has provided the actors of hospitality with several new technologies and they can help in the improvement of a company’s channels; however, for a good exploitation, it can be useful to integrate them with additional promotion activities and strategies.

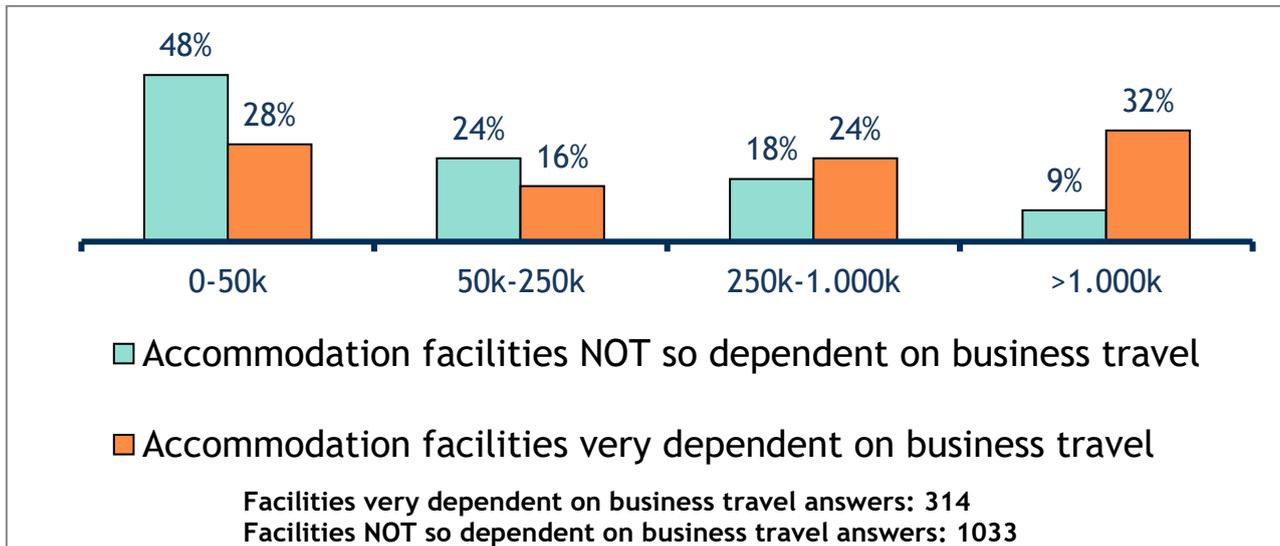
### *Business travel and digital technologies*

As it was said in the second part of the literary review, the adoption of new technologies for the management of the different operations can depend on several factors, like the financial resources and the objectives of the company. The purpose of this part is to verify if also the characteristics of the customer base of a facility can be a driver for this choice. In the first part of the literary review, it was underlined the fact that the two main segments of hospitality are “business” customers and “leisure” customers. Thus, it was made a comparison among accommodation facilities very impacted by business travellers - all the respondents that in 2016 had more than 20% of their revenues related to business travels - and facilities for which the segment is not so relevant - the other respondents -. Comparing these two groups, it emerged that the respondents very dependent on business travellers were more likely to introduce digital technologies: 83% of them had introduced at least one technology, against the 72% of the other respondents (Graph 50).



Graph 50: introduction of digital technologies by accommodation facilities (comparison of the dependency on business travel)

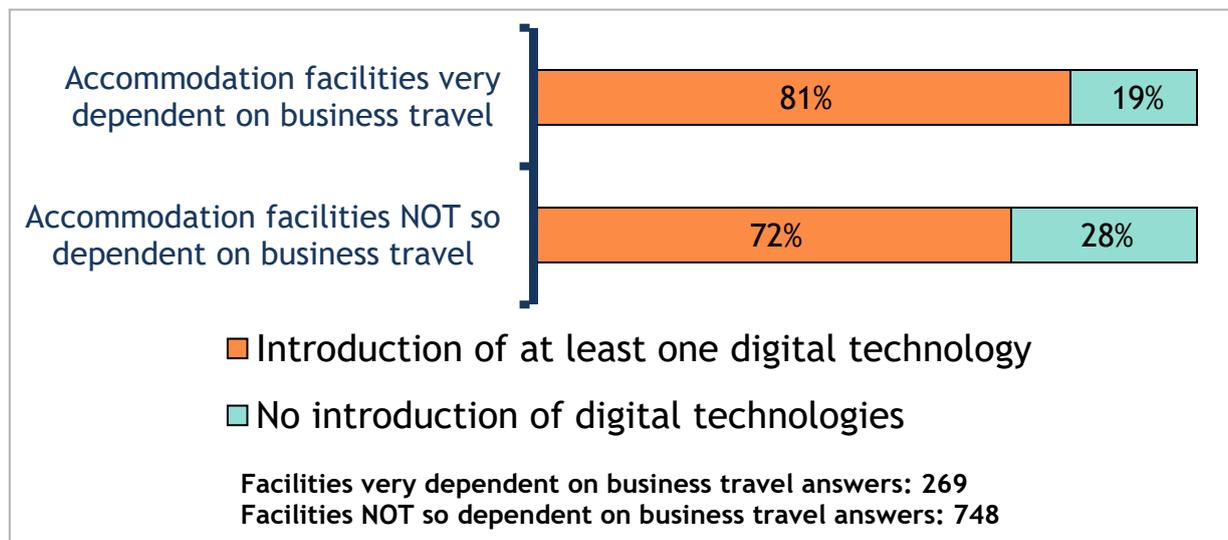
Anyway, the results could be compromised by the fact that the group made by accommodation facilities very dependent on business travellers, tend to have more revenues respect to the others and thus, probably more financial resources (Graph 51).



Graph 51: distribution of the facilities based on the range of revenues for the year 2016 (comparison of the dependency on business travel) (data in euros)

In order to overcome the effect of the financial resources, the analysis was narrowed down only to the facilities that in 2016 had total revenues lower than 0.5 million of euros. Nevertheless, also in this

case, the accommodation facilities more dependent on business travel seem to be more correlated to the introduction of digital technologies (Graph 52).



*Graph 52: introduction of digital technologies by accommodation facilities with revenues lower than 0.5 million of euros in 2016 (comparison of the dependency on business travel)*

Thus, it is possible stating that also the “type” of customer base could be one of the several factors that might influence the decision of implementing – or not – some digital technologies for the management of processes. In particular, according to the results, a customer base more business-oriented seems to be correlated with higher attitude in introducing the technologies.

Two of the possible explanation for this relationship might be the following:

- The advantages of innovative payment systems: according to an HRS<sup>128</sup> study (HRS, 2018), the use of virtual payment solutions in travel programs by business travel, can reduce the costs of the 12%. So, since business travel managers might be interested in introducing these solutions, accommodation facilities should adapt and improve their payment solutions.
- The importance of loyalty programs: loyalty programs can be really an important element for attracting business traveller and in an investigation made by Wanup in 2017, on a sample of Italian business traveller, the 54.6% of the interviewed was part of a program (Wanup, 2018). So, probably for trying to satisfy the need of this segment, it could be useful to leverage on loyalty program, and thus CRM.

<sup>128</sup> <https://www.hrs.com/it/>

Anyway, these are only two of the possible explanations; what is really important understanding is that business traveller and leisure traveller are very different and according to the results, in order to reach the formers, it might be useful to adopt new digital technologies.

## Relationships with online actors

The previous two chapters presented some strategies and technologies that may support the improvement of digital owned channels. The next step consists in understanding how the providers of hospitality industry perceive the main online actors, which can affect their activities – positively or negatively depends on several factors – and the reasons behind the different attitudes. If the environment emerging from the analysis is very conflictual, a company should try to carry out initiatives aimed at improving direct channels. For example, in order to reduce the impact of intermediaries, Hilton Hotels & Resorts has made strong investment, as witnessed by an advertisement broadcast during the Emmy Awards of 2016<sup>129</sup>. Then the strong effort, the CEO Nassetta proclaim himself satisfied by the results: in 2017 Hilton added a record of 11 million more Hilton Honors loyalty members for a total of 71 million; and the 95% of those members are booking direct<sup>130</sup>.

The actors that will be investigated are: OTAs and Home Sharing portals, review sites and applications/portals food-related.

### *Relationship with OTA/Home sharing portals<sup>131</sup>*

As it was pointed out in the second chapter of the research results, the presence on OTAs represents one of the most diffused instrument for promotion and the one considered most effective; moreover, after direct bookings, most of the reservations of accommodation facilities come from OTAs, as seen in chapter one (of the research results). Some respondents believe so much in the importance of OTAs that do not even put a lot of effort in promoting their own channels: the 59% of those present on OTAs does not make advertising – on social network, search engine or on websites of localities -, the

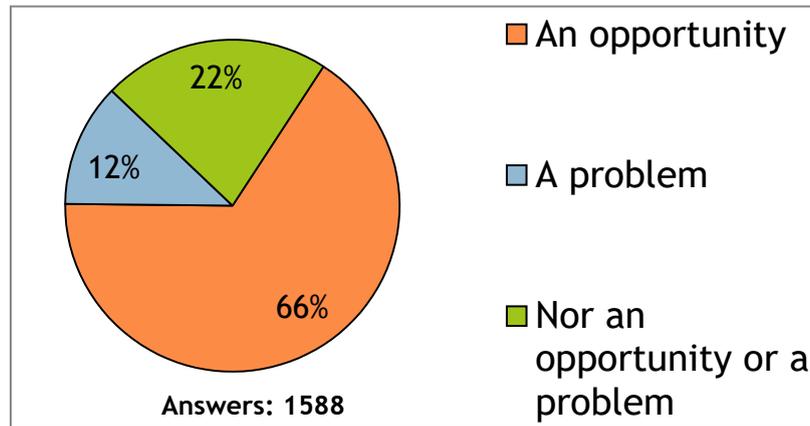
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<sup>129</sup> Thing D. (2016) Hilton's New Ad Campaign and the Push for More Direct Hotel Bookings. Skift

<sup>130</sup> Thing D. (2018) Hilton CEO Believes Direct Booking Campaign Is Key to Improved Guest Experience. Skift

<sup>131</sup> As seen in the literary review home sharing portals can be seen as OTAs of vacation rentals; so, in this section it will be used the general term "OTA" to refer to all the different cases. Home sharing portals can be defined as the OTAs of rental vacation; so, in this section it will be used the general term "OTA" to refer to all the different cases.

30% of those present on OTAs is not present in any other portals<sup>132</sup> (metasearch, vertical portals or blog) and the 24% does not use advertising or any other portal that is not OTA<sup>133</sup>. So, it is possible starting to assume that some companies strongly believe in the opportunities of OTA; but let us see what is the general opinion of the respondents: only the 12% of the respondents considers OTA a problem against the large majority that consider them an opportunity (Graph 53).



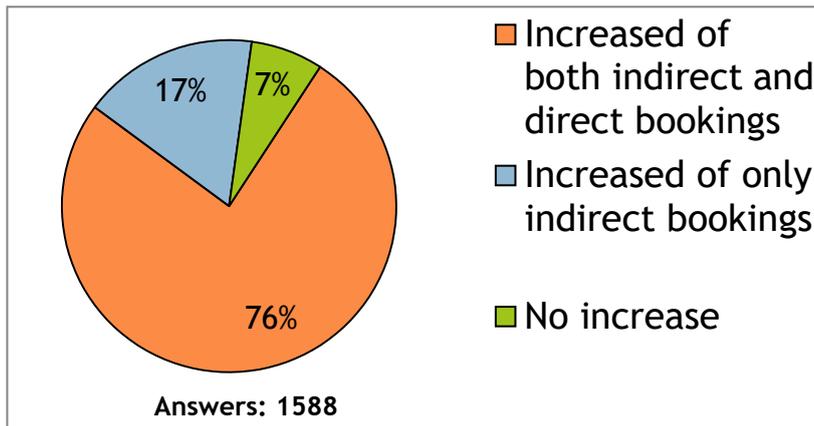
*Graph 53: opinion about OTAs/Home Sharing Portals*

Basically, between respondents there is a certain positiveness about OTAs and Home Sharing Portals, confirming what was reported in the literary review about direct bookings war: in Europe and Asia, OTAs bookings reduction does not represent a challenge<sup>134</sup>. This positiveness is probably related to the fact that most of the respondents present on OTAs affirm to have assessed an increased in the number of bookings, both indirect and direct (Graph 54).

<sup>132</sup> Only portals not for free were considered

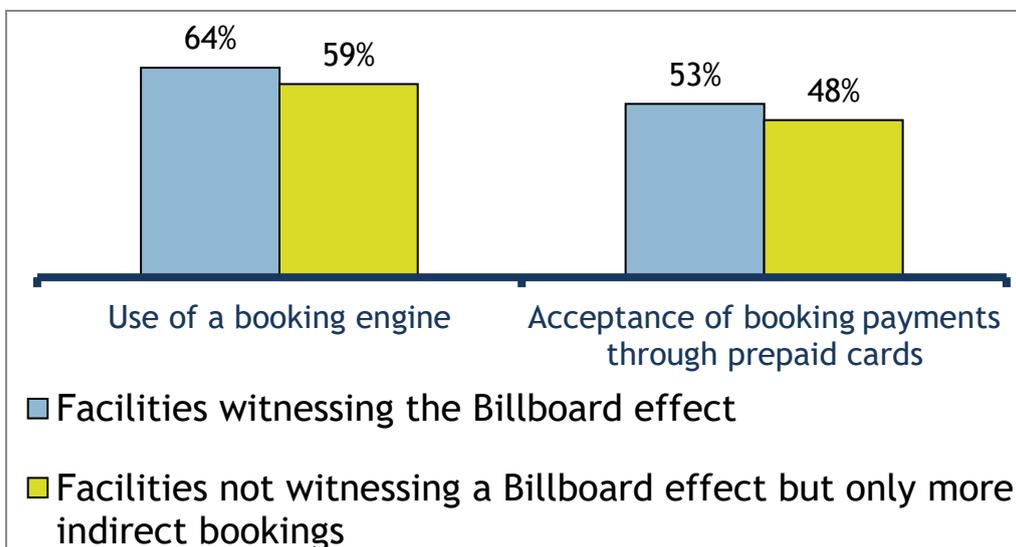
<sup>133</sup> Answers considered in all these information: 977

<sup>134</sup> Whyte P. (2017) The Direct Booking War Is a Myth, at Least in Europe. Skift



Graph 54: effect on bookings of the presence on OTAs

So, it is possible assuming the existence of a billboard effect in the 76% of respondents present on OTAs, while for the 17% the impact of OTAs is only on indirect bookings. The possible reasons behind the impossibility of exploiting the billboard effect are several (e.g. absence of a book engine) and not all of them are controllable by accommodation facilities (e.g. the customer wants to book as soon as possible so it prefers not to go out from the OTA's funnel). Comparing the companies that have also assessed an increase of direct bookings against those that only increased indirect ones it is possible noticing two interesting differences: the presence of a search engine is higher in the first group, as well as the acceptance of booking payments from prepaid cards (Graph 55).

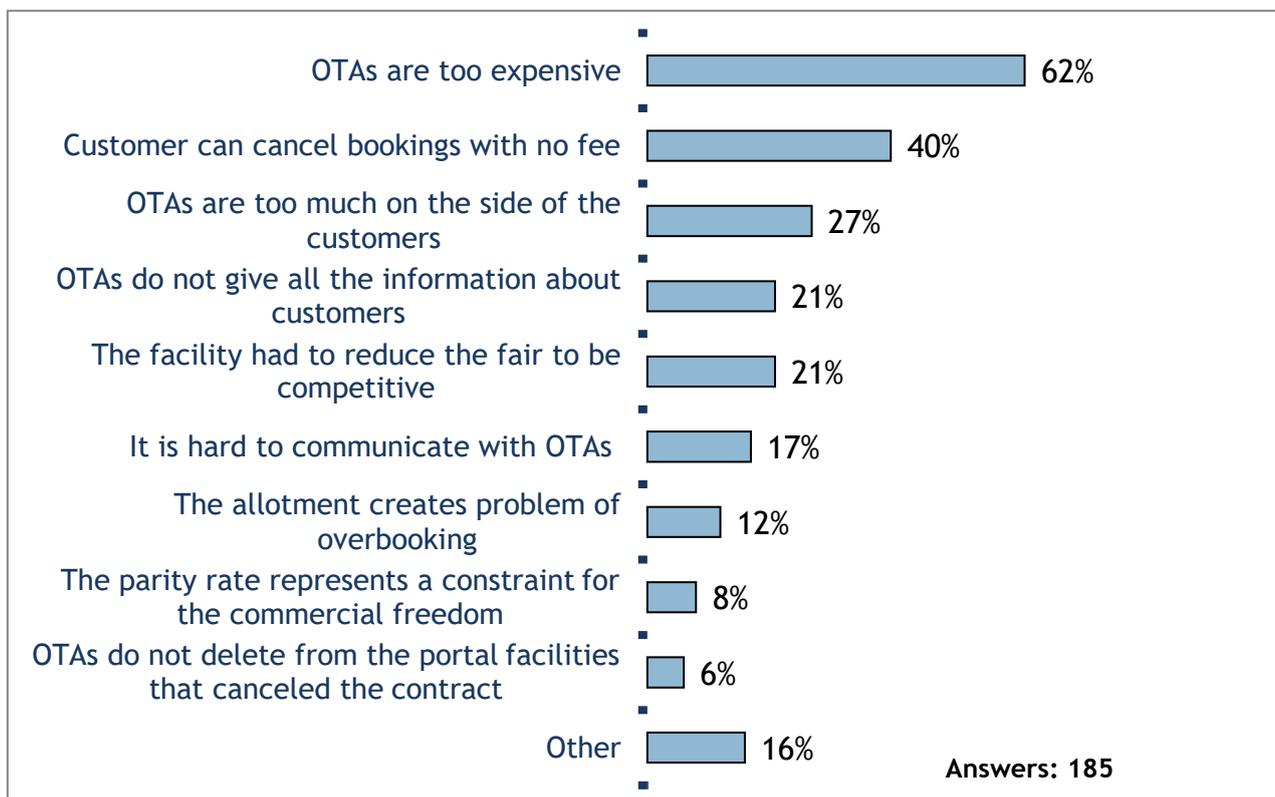


Graph 55: use of book engine and acceptance of prepaid cards (comparison of witnessing the Billboard effect)<sup>135</sup>

<sup>135</sup> Facilities witnessing the Billboard effect answers: 715 (in use of book engine) and 965 (in acceptance of booking payments through prepaid cards).

So, these elements may be the reasons why some companies do not register also an increase of direct bookings: probably, the customer coming from an OTA and arriving to the website of an accommodation facility, has already made his/her purchase decision, and the company should make him/her in the condition of completing the booking. The customer may become upset if he/she cannot immediately book through a book engine – and so he/she has to book through email or other channels – or, if he/she has almost completed the booking but cannot pay using his/her prepaid card. The providers of hospitality industry should really take into consideration this last element; in fact, prepaid cards are a safe instrument for online payment and they are becoming very popular: in 2016 in Italy, the number of prepaids card has increased of +3.7% respect to 2015<sup>136</sup>.

Looking now at accommodation facilities that perceive OTAs as a problem; it resulted that the main problems that they have with these channels are about high costs and the fact that customers can cancel the booking with no fee (Graph 56).

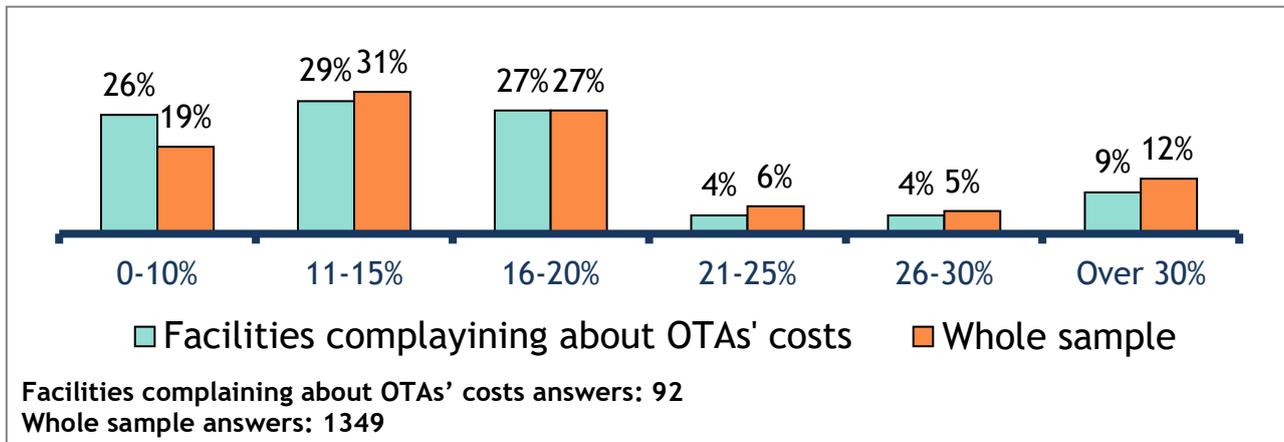


Graph 56: opinion about OTAs

Facilities NOT witnessing the Billboard effect answers: 165 (in use of book engine) and 223 (in acceptance of booking payments through prepaid cards)

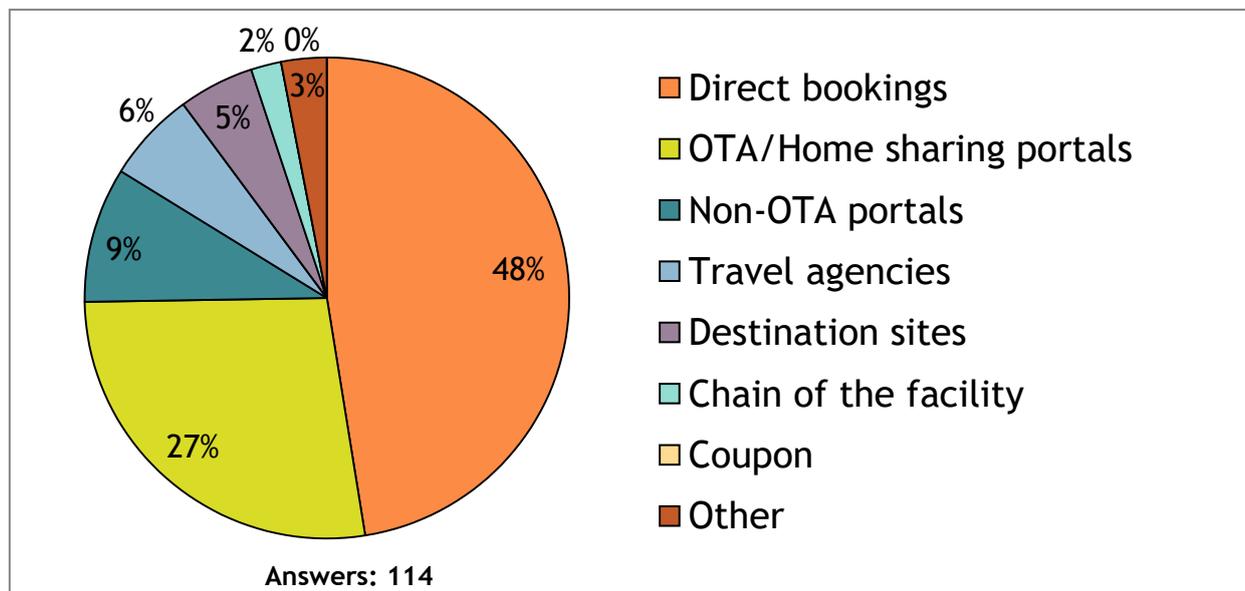
<sup>136</sup> Source: CRIF (<https://www.crif.it/>)

Considering now the respondents complaining about the cost paid to OTAs, it resulted that the commissions that they pay is not very high respect to the others: only the 23% of them has commissions over the 20% (Graph 57).



Graph 57: commissions paid to OTA (comparison based on the complaining about costs)

So, if these companies complain about high cost to pay to OTAs and do not seem to have high commission, probably they are very dependent on them, and that could be the reason of the high cost. However, looking at the booking channels of these facilities, this hypothesis does not seem to be working: the percentage of direct bookings is higher than the whole sample (+4 percentage points), as well as the portion of bookings from OTAs is lower (-8 percentage points) (Graph 58).



Graph 58: booking channels of accommodation facilities complaining about high cost for paying OTAs

So, at this point it is impossible understanding why some respondents complain about the high cost of OTAs and more likely, the reasons are inside companies themselves; for instance, if a company has always been used to have only direct bookings and at a certain time the bookings from OTAs strongly increased, the perception of the cost paid to OTA may be high. Another reason could be that if a facility is present on other portals that are cheaper, the perception of OTAs cost may be compromised. Anyway, these considerations are only assumptions; exploiting the available data it is only possible saying that the complains about high cost paid to OTAs, do not seem to be correlated with high commission costs or high portion of bookings coming from these channels.

Another interesting point about the complaints of (some) respondents of the survey about OTAs, is the fact that only few of them are upset about the parity rate (Graph56). From 2 August 2017, also in Italy the parity rate has been banned<sup>137</sup> and so, accommodation facilities can offer on their website a price more convenient than on OTAs. However, if a company decides to have a lower price on its website in order to increase direct bookings against OTAs channels, it should also consider some drawbacks. Keeping on “stealing” bookings from OTAs may affect – negatively - bookings from these channels; and since the visibility on OTAs also depends on the sales<sup>138</sup>, it will be harder for a customer to find the facility – on the long term -. So, basically there is the risk for a company not respecting the parity rate, to be penalised in the researches of customers on OTAs. Another risk to take into consideration is about the promotion made by OTAs and the effect may be assessed in the short term. In fact, if in a destination there are several accommodation facilities not respecting the parity rate, the portals may decide not to make promotion of that locality; thus, the destination and the accommodation facilities are compromised<sup>139</sup>. Matching this risk with the fact that only few respondents complain about the parity rate, it is possible conjecturing that in the future there will not be many facilities offering lower prices on their website and those trying to “steal” bookings to OTAs should be aware that they need strong investment in promotion in order to not compromise their global visibility, maybe exploiting other channels like metasearch.

Finally, the scenario emerging from the survey involving accommodation facilities, seems to present an Italian market very positive about OTAs, which are seen more as a support than as an “enemy”,

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<sup>137</sup> Manescalchi M.(2017) Abolizione della parity rate: un ottimo punto di partenza...e sei motivi per cui non basterà ad aumentare le prenotazioni dirette. Hospitality News

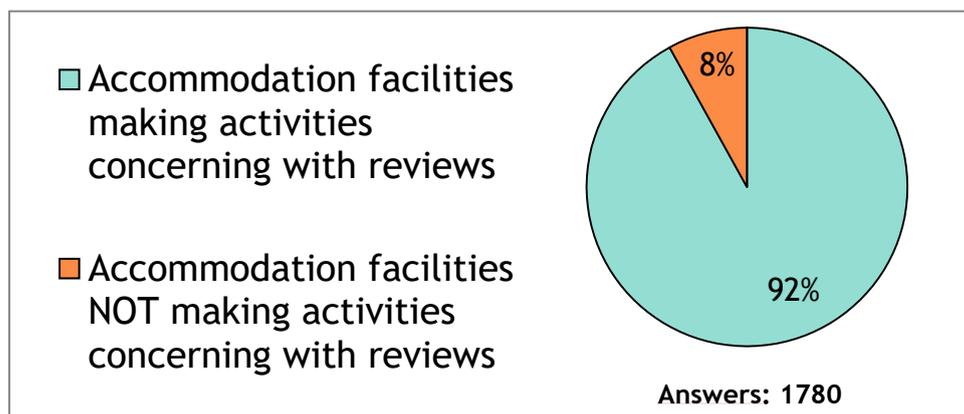
<sup>138</sup> Laico F. (2017) Parity rate, ecco perché non conviene penalizzare le OTA. Franco Grasso Revenue Team

<sup>139</sup> Caldari E. (2015) Finalmente la parity rate sarà vietata per legge. Ma non cambierà nulla. Ecco i motivi. Digital Marketing Turistico

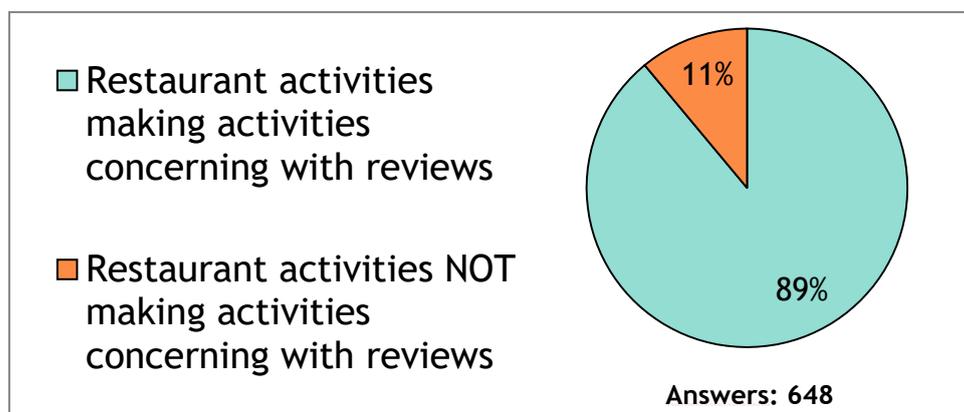
also because many facilities witness an increase of both indirect and direct bookings thanks to them. Moreover, only few respondents complain about them and mainly because they perceive they are paying too much on these portals – although from the results it seems there is not a strong link between this perception and the commission rate or the percentage of bookings from OTAs -; on the other side the parity rate is not seen as an important problem.

### *Review sites relationship*

The activities concerning with the reading and the collection of reviews are very important for the providers of hospitality industry, because thanks to them they are able to understand points of strengths and of weaknesses of their business. It seems that the providers of the Italian hospitality industry understood the importance of reviews and in fact, activities concerning with them, like reading online reviews or giving surveys to customers, are carried out by 92% of accommodation facilities (Graph 59) and 89% of restaurant activities (Graph 60).



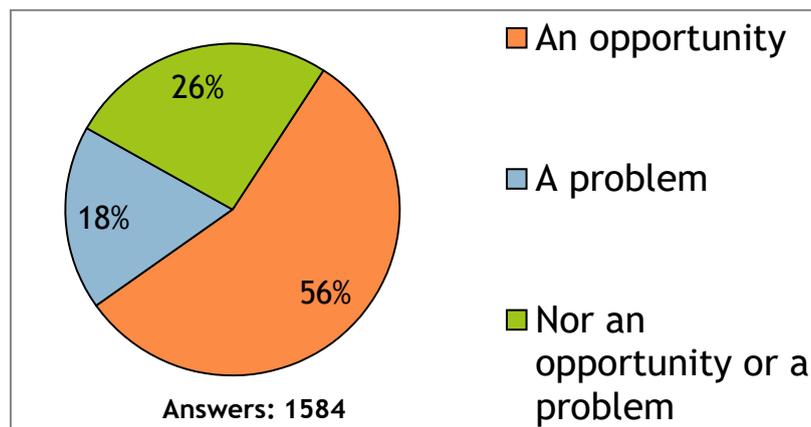
*Graph 59: accommodation facilities and reviews-related activities*



*Graph 60: restaurant activities and reviews-related activities*

Most of them exploit one or more external websites or portals to manage these activities: the 84% of accommodation facilities<sup>140</sup> respondents read reviews on review sites, while for restaurant activities the percentage is about 80%<sup>141</sup>. Moreover, as it will be presented in the next section, app or portals concerning with reviews and finding restaurants are the most diffused between the apps related to restaurant activities. So, mainly it is possible talking about an Italian hospitality industry very interest in the exploitation of these sites/portals; and this is not surprising, since this way the visibility of a company can be improved. Moreover, another incentive for using review apps/portals is the opportunity of exploiting the electronic world of mouth (eWOM): basically, if a restaurant (or an hotel) works well, everybody can know it.

However, the popularity of these portals has made them object of opportunistic behaviours, like the purchase of false reviews to have a better rating. Nevertheless, in general the opinion of the respondents about review sites tend to be positive, especially for accommodation facilities respondents: most of them consider the review sites an opportunity and only a minority a problem (Graph 61).

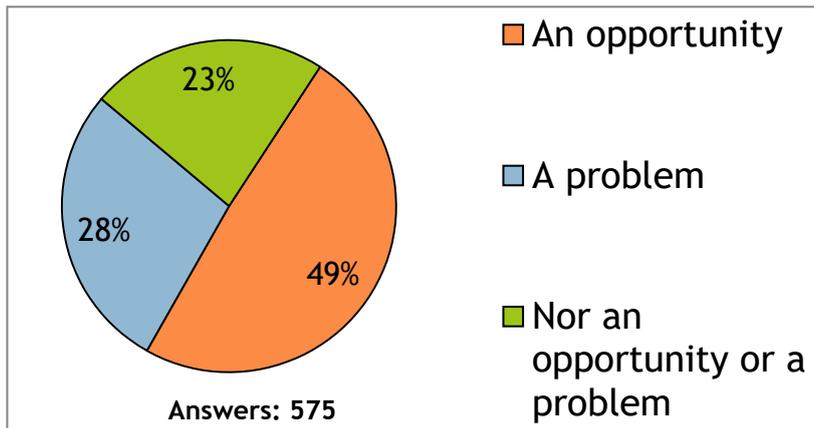


*Graph 61: opinion of accommodation facilities about review sites*

Also restaurant activities respondents tend to be positive, although a lower percentage (-7 percentage points) considers review sites an opportunity and an higher one considers them a problem (+10 percentage points) respect to accommodation facilities (Graph 62).

<sup>140</sup> Answers considered: 1780

<sup>141</sup> Answers considered: 648

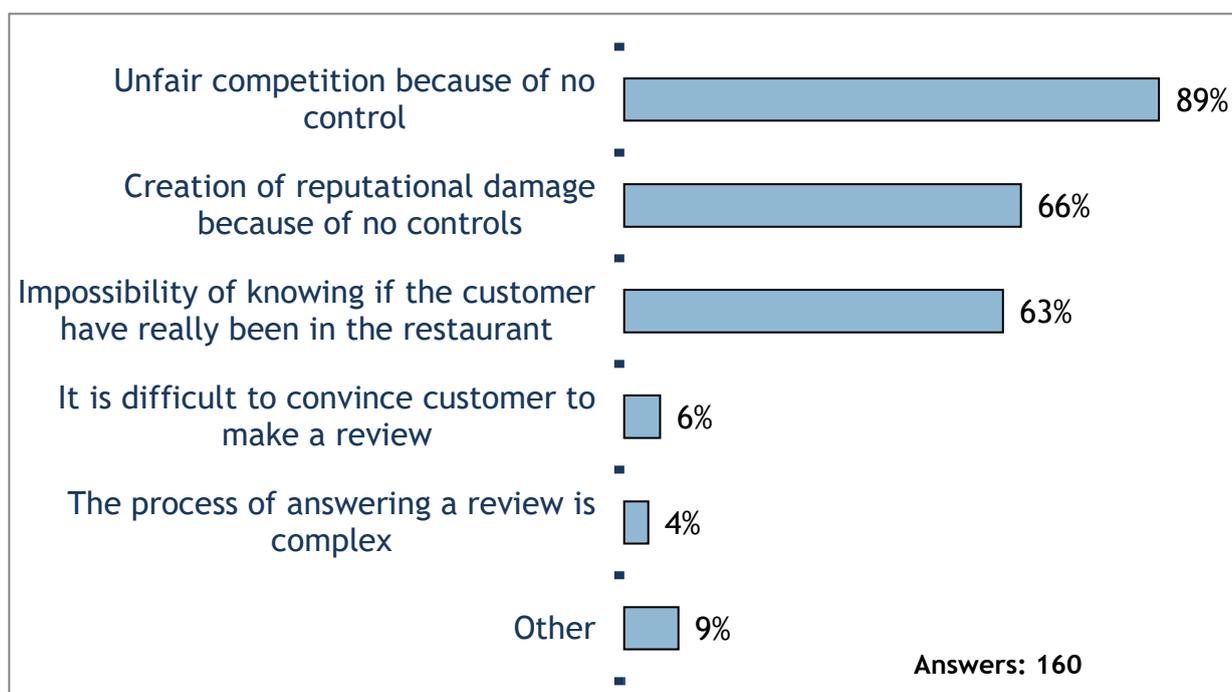


Graph 62: opinion of restaurant activities about review sites

Although, the percentages are different, the reasons behind sceptical respondents are similar: it is possible saying that both accommodation facilities and restaurant activities respondents complain more about the absence of control respect to other problems (Graph 63 and Graph 64).

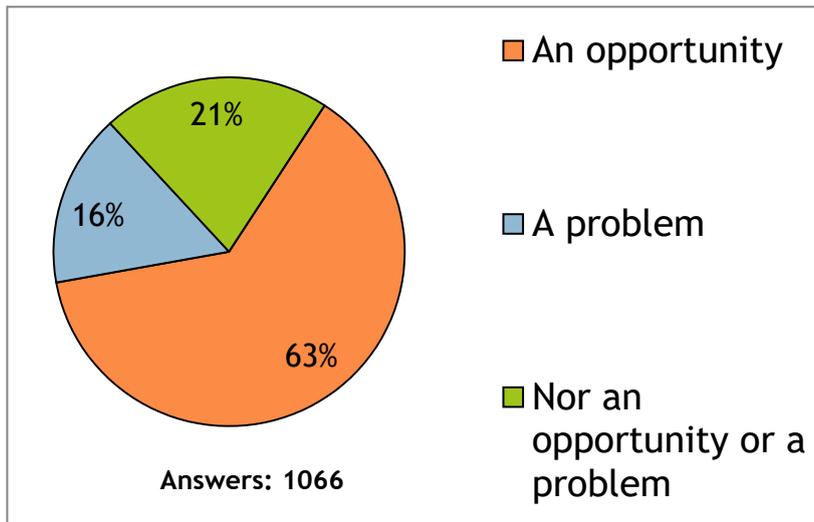


Graph 63: reasons why review sites are seen as a problem by accommodation facilities



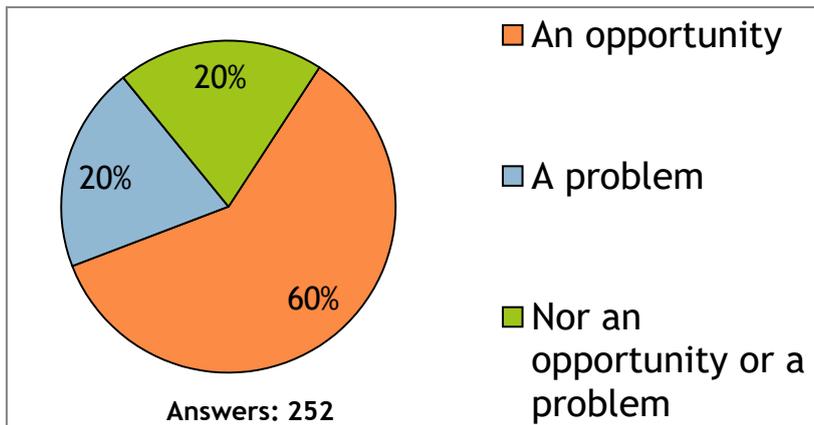
*Graph 64: reasons why review sites are seen as a problem by restaurant activities*

So, the actors of the Italian hospitality industry are aware of the opportunities of review sites and portals, but there are some of them that complains about the lack of controls that may generate false reviews (both positive or negative) and about the impossibility of assessing if a customer has really been in the facility. Although the companies cannot directly act on these problems, some activities can be implemented: when a bad false review emerges, a company has the possibility to report it to the portals, but also to reply. So, answering the review can make the other users understand that it was not true, and so, by the time the portal will cancel that review, the reputation of the business is not compromised. Another case to consider is when too pretentious customers, that maybe have tried to get more benefits paying less without success, write reviews; also in this case, answering to the negative reviews can make other users understand the reality of what happened. So, it is possible assuming that answering negative reviews may overwhelmed some of the problems concerning these portals and the results of the surveys can support this hypothesis. In fact, respondents that answer frequently to negative reviews, tend to have a better opinion of these portals compared to the others: in the case of accommodation facilities the percentage of respondents considering review sites an opportunity has increased of 7 percentage points, while those seeing a problem has decreased of 2 percentage points (Graph 65).



*Graph 65: opinion of accommodation facilities answering frequently to negative reviews*

Similarly, considering restaurant activities respondents answering frequently to negative reviews, the percentage of those having a positive attitude to review sites has increased of 11 percentage points and those more sceptical have decreased of 8 percentage points (Graph 66).

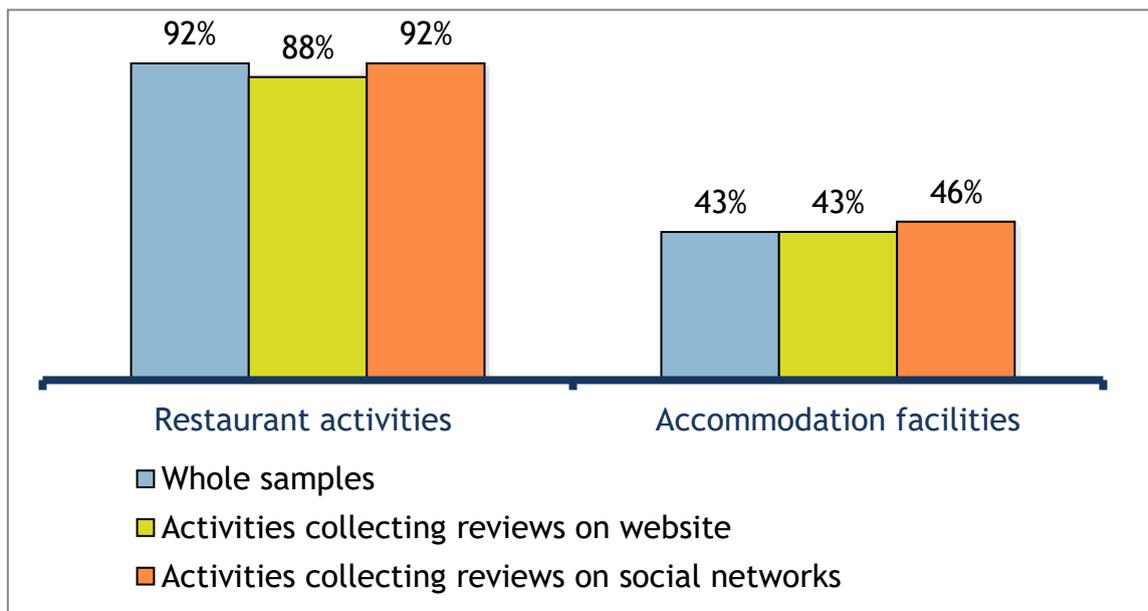


*Graph 66: opinion of restaurant activities answering frequently to negative reviews*

So, in order to avoid some of the drawbacks of review sites, the actors of hospitality should spend more time on these channels, monitoring the reputation and answering to bad reviews; moreover, it is always important to consider “How” to answer. Answering in an unpolite way to a review may damage the reputation even more than bad reviews.

Anyway, some activities may decide to exploit other channels for the reviews, like social network accounts and website. In these two cases, the company is sacrificing the high visibility of external portals for a stronger control on the reviews. Moreover, since the customer is reading reviews from a

channel owned by the company there could be higher probability of having a direct booking. Let us verify if this hypothesis is true for the respondents of the surveys. The facilities collecting reviews on website seems not to have better performance in terms of direct bookings and this is true for both accommodation facilities and restaurant activities (Graph 64). Similarly, also restaurant activities collecting reviews on social network do not have higher portion of direct bookings, but accommodation facilities do, with +3 percentage points respect to the whole sample (Graph 67)



Graph 67: percentage of direct bookings of restaurant activities<sup>142</sup> and accommodation facilities<sup>143</sup> (comparison of the channels for reviews)

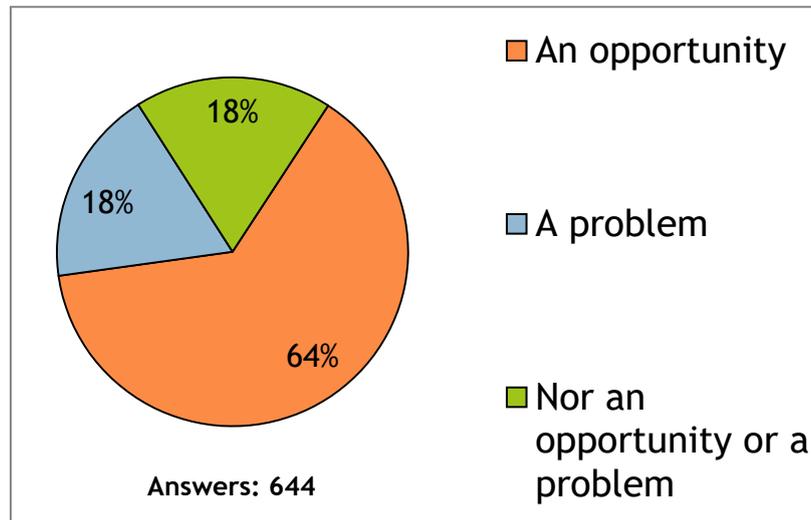
It is possible conjecturing, that the collection of reviews on social networks seems to be slightly more effective than on website and this is probably related to the fact that by nature, social networks are more similar to review sites; in fact, they are both communities. On the other side, it is really difficult to build a community inside the website.

However, the choice of collecting reviews on social networks and/or the website is not exclusive of external portals; a company can decide to use both in order to collect as much information as possible. In fact, 93% of accommodation facilities collecting reviews on social networks or website also read

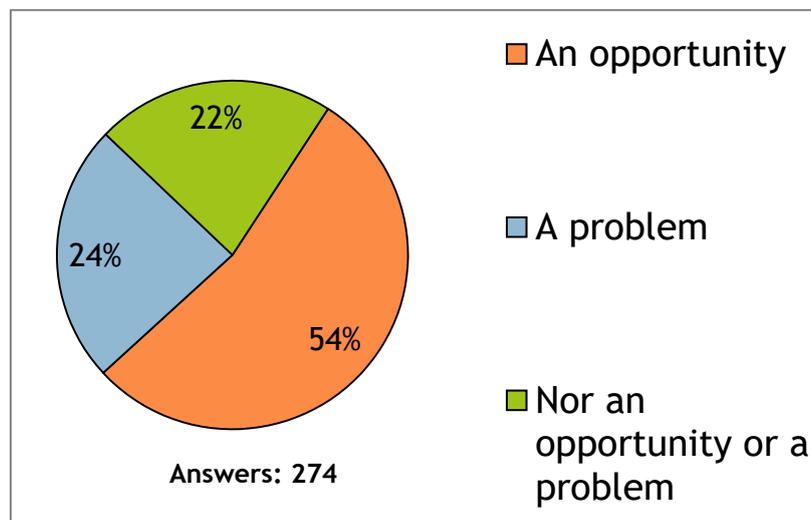
<sup>142</sup> Whole sample answers: 611; activities collecting reviews on website answers: 35; activities collecting review on social network answers: 271

<sup>143</sup> Whole sample answers: 611; activities collecting reviews on website answers:165; activities collecting review on social network answers: 609

reviews<sup>144</sup> on external sites and the percentage of restaurant activities is 91%<sup>145</sup>. Moreover, the opinion of the respondents that exploit owned channels for collecting reviews about external sites is not more negative than all the respondents presented in them: for accommodation facilities the percentage of respondents considering review sites a problem is not change, while for restaurant activities it reduced of 4 percentage points (Graph 68 e Graph 69).



Graph 68: opinion of accommodation facilities collecting reviews on website and/ or social networks about review sites



Graph 69: opinion of restaurant activities collecting reviews on website and/ or social networks about review sites

<sup>144</sup> Answers considered: 720

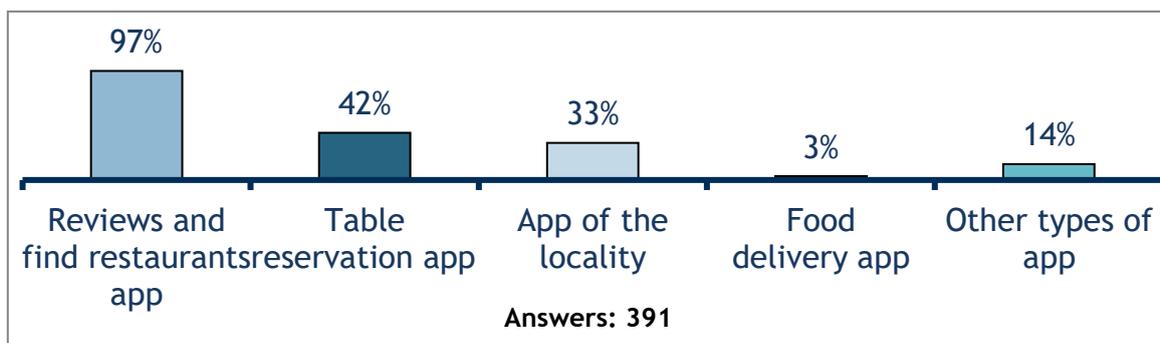
<sup>145</sup> Answers considered: 290

So, it is possible stating that the use of the website and/or social network accounts by the actors of the Italian hospitality industry is not considered an alternative to review sites, but it is just complementary; this way, companies can collect feedbacks from several channels. Thus, it becomes important a continuous monitoring of all the channels.

Finally, it is possible concluding that by the surveys' results, the actors of the Italian hospitality really care of the reviews and there are even actors interested in collecting them through both external portals and owned channels; these actors represent the 44% of accommodation facilities respondents carrying out reviews-related activities<sup>146</sup> and the 50% of restaurant activities respondents making the same activities<sup>147</sup>. Anyway, it is important continuously monitoring the different channels, especially external portals, which present some pitfalls.

### *Applications and portals food-related*

The main objective of this part is the understanding of how restaurant activities perceive the different applications/portals related to food, but also the reason behind negative and positive attitudes. All these apps have become very popular and in fact, 52%<sup>148</sup> of respondents are present on at least one of them. The main diffused type concerns with reviews and finding restaurants (Graph 70) and the different aspects of the use of these apps can be reconducted to the analysis made in the previous section. On the other hand, this part will focus on table reservation applications/portals, like TheFork<sup>149</sup> or Quandoo<sup>150</sup>; and on food delivery apps, like JustEat and Deliveroo.



*Graph 70: categories of applications for restaurant activities*

<sup>146</sup> Answers considered: 1638

<sup>147</sup> Answers considered: 576

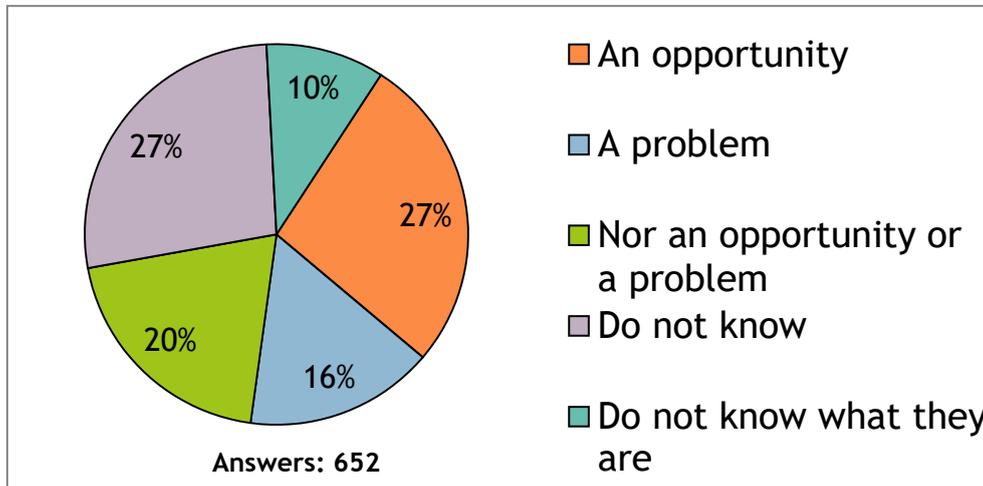
<sup>148</sup> Answers considered: 763

<sup>149</sup> <https://www.thefork.com/>

<sup>150</sup> <https://www.quandoo.it/>

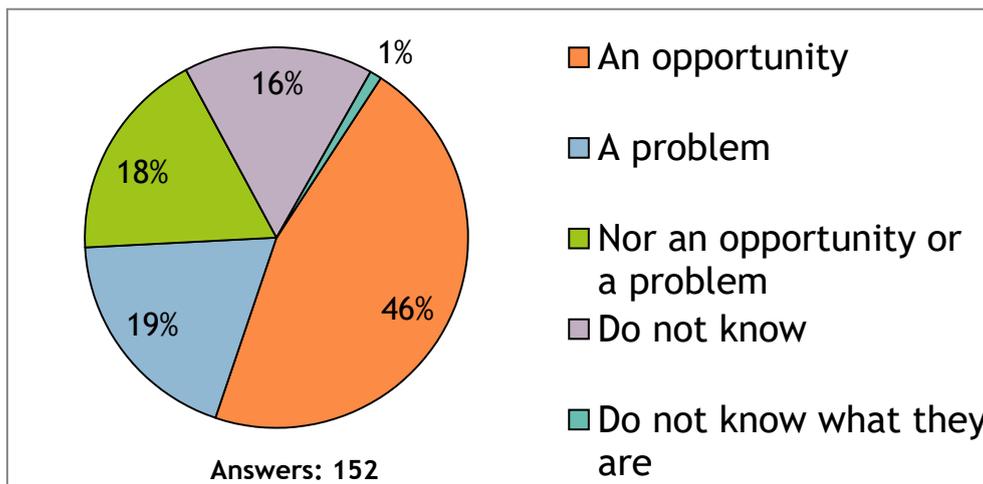
## Online table reservation apps

The second type of app used by restaurant activities are applications for table reservation. The opinion about them is very controversial and according to the survey results, mainly there is a certain optimism around them, with 27% of respondents seeing them as an opportunity (Graph 71).



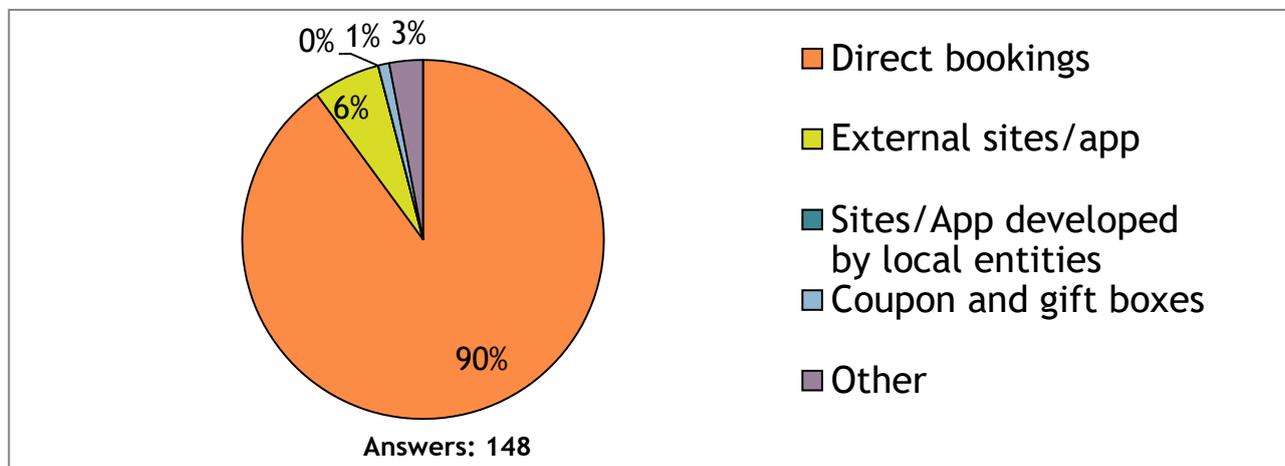
Graph 71: opinion about online table reservation apps/portals

However, what it is more interesting is knowing the opinion of those restaurant activities actually present on these apps/portals. The results are different and look quite “abnormal” because, although the activities considering the online reservation apps an opportunity have strongly increase respect to the whole sample (+19 percentage points), also those seeing them as a problem have raised (+3 percentage points) (Graph 72).



Graph 72: opinion about online table reservation apps/portals of activities using them

In order to understand a possible reason behind the “unsatisfaction” of some respondents, let us consider the direct channels of the users of these apps. It seems that they have a lower portion of the overall direct bookings respect to the whole sample (-2 percentage points), and they have more bookings from external apps/portals (+3 percentage points) (Graph 73).

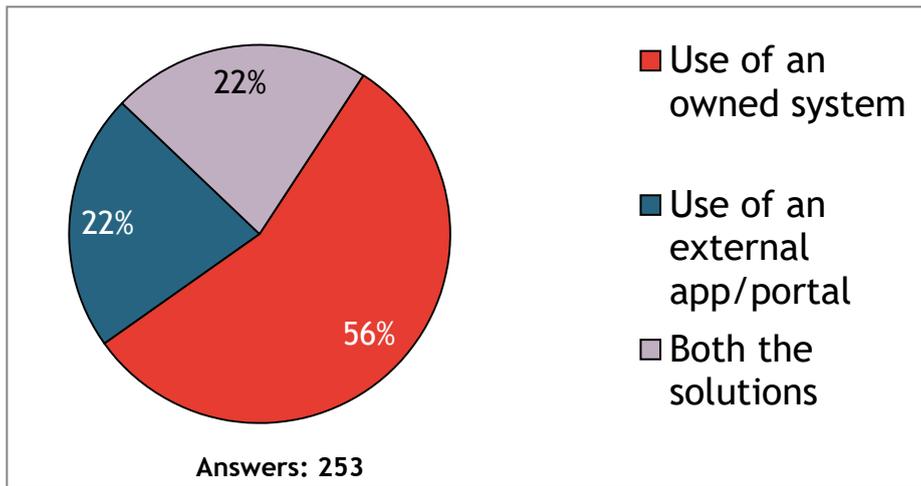


*Graph 73: booking channels of activities present on online table reservation apps/portals*

So, after this consideration, maybe it is possible assuming that the negative attitude towards these channels could be related to the increase impact of intermediaries.

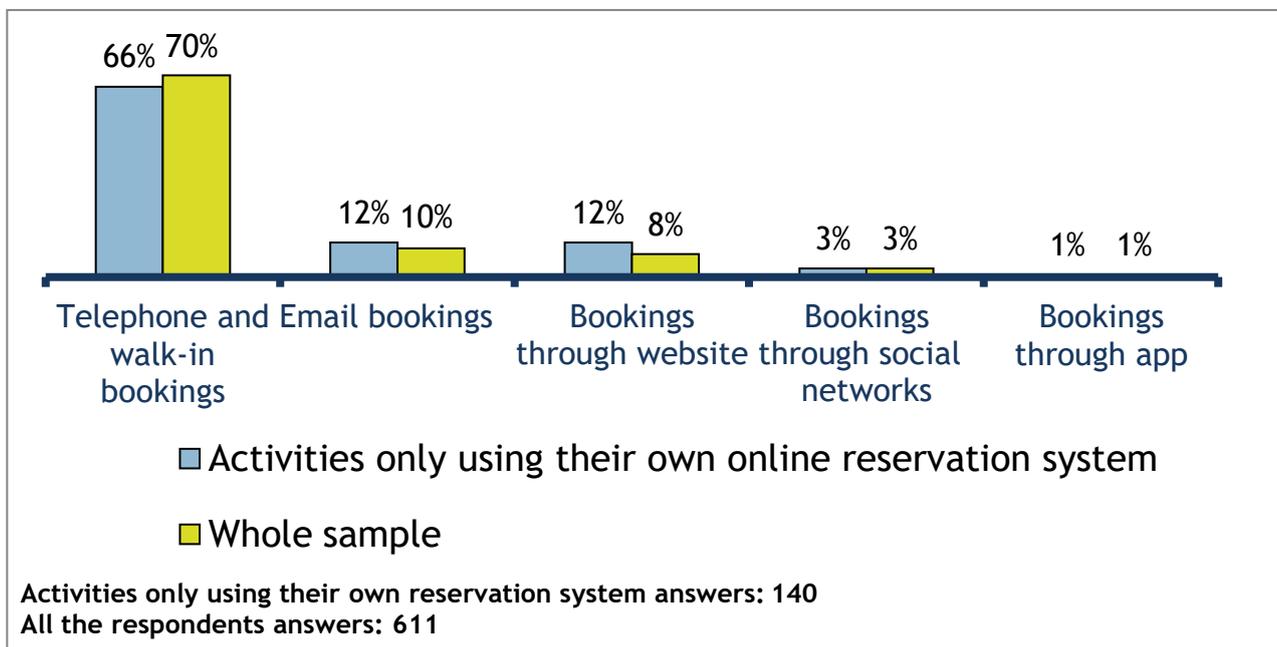
Anyway, if a restaurant activity is “scared” by the threat of losing direct bookings can still decide to have its own system. According to the survey results, between all the respondents having an online reservation system<sup>151</sup>, the 81% make it available on website, social network accounts or app; and inside this group the 56% has its own system refusing to use an external app (Graph 74).

<sup>151</sup> 763 respondents



Graph 74: type of online table reservation system implemented

This solution seems to be working: while the percentage of direct bookings of the whole sample is on average around the 92% (Graph 20 of the “Booking channels” section), the respondents using an owned online table reservation system assess a percentage of about 95%<sup>152</sup>. The main driver of this difference is represented by the website component with an improvement of 4 percentage points, respect to the whole sample (Graph 75).



Graph 75: direct bookings and their channels (comparison in the use of an owned online reservation system)

<sup>152</sup> 140 respondents

So, it is possible conjecturing, that maybe an online reservation system owned by the restaurant activities could really improve the impact of the direct channels.

However, it is important remembering that the percentage of those using external apps and considering them an opportunity is still much higher than the ones that considers them a problem (46% in Graph 72). Probably, for many companies, the problem of having all the tables “full” is much more relevant than intermediation, and online table reservation apps represent a solution, because of their visibility. About this, it could be useful the witness on [theforkmanager.com](https://www.theforkmanager.com/it/testimonial/elio-sironi-cesesio/)<sup>153</sup> of Elio Sironi, chef at Ceresio7<sup>154</sup> of Milan. Sironi stated that thanks to TheFork, his restaurant was able to increase the number of bookings: in fact, the restaurant tended to have “empty” tables until 9:30 p.m. and started to fill after that hour; now with the support of the app, the reservations before 9:30 p.m. has increased.

Finally, it is possible concluding that online reservation systems can represent an additional channel for restaurant activities and so, it may increase the number of bookings; however, restaurant activities have also to decide whether to implement a property-owned system or to exploit existing apps/portals. The risk of the second solution is to become more dependent on apps – and so there is a reduction of margins – but on the other side, it is possible having more visibility and so higher probability to reach saturation or the break-even point.

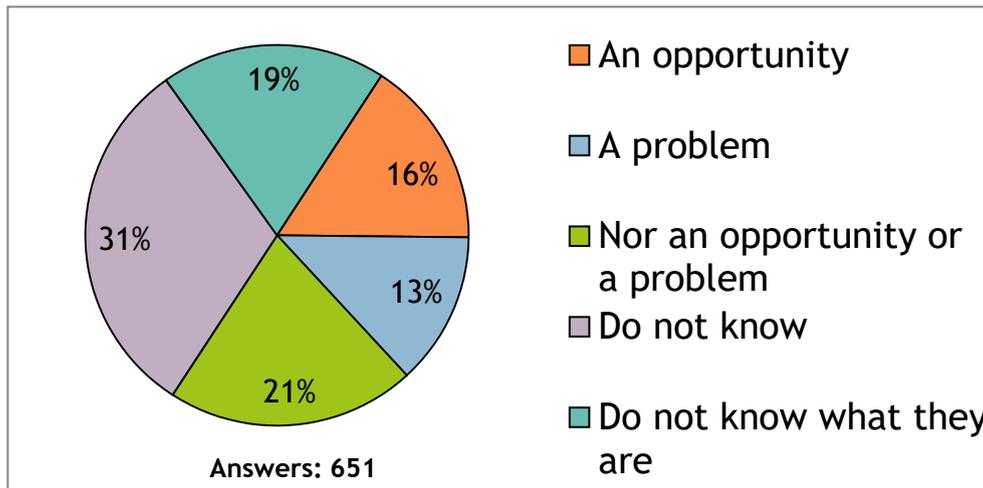
### Food delivery applications

Food delivery applications are the less diffused among applications used by restaurant activities. The reason of this low use rate is that half of the respondents does not even know what it is or is unable to say if it is an opportunity or a threat; so, it is possible conjecturing that the Italian market of restaurant activities is still not very aware of this new solution (Graph 76).

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<sup>153</sup> <https://www.theforkmanager.com/it/testimonial/elio-sironi-cesesio/>

<sup>154</sup> <http://www.ceresio7.com/>



Graph 76: opinion about food delivery apps/portals

Probably, the low awareness of the respondents is related to the fact that the providers of the service have really focused on metropolitan areas without considering provinces; in fact, as stated by Paolo Fiore, writers of *The Food Makers*<sup>155</sup>, cities are starting to become an overcrowded market<sup>156</sup>. Moreover, Fiore also point out that in the future, big players will start to look also at provinces as well as newcomers, more oriented towards them will rise, like Foodracers<sup>157</sup>, a food delivery app that operate in small cities of Emilia-Romagna, Veneto and Lombardy.

Finally, the data presented have shown that the Italian market is not very aware of Food delivery apps, but this is because the business is still too focused on big cities and not on the realities of small cities and towns; probably, considering only activities present in the cities the results would have been different. However, in the future scenario it is possible conjecturing a stronger penetration of this business also in provinces.

### *The emerging environment*

After analysing the relationship with several online actors, it has emerged an Italian hospitality industry very positive about Internet companies, in fact many respondents see some opportunities in them. Of course, there are also some pitfalls: review sites should be more monitored and food delivery apps are still not very popular outside big cities; however, the scenario is generally positive. In this environment, promotion activities of owned channels should not be intended as a “weapon” for

<sup>155</sup> <http://thefoodmakers.startupitalia.eu/>

<sup>156</sup> Fiore P. (2016) Italia, terra da risiko del food delivery. Prossima sfida: la provincia. *The Food Makers*

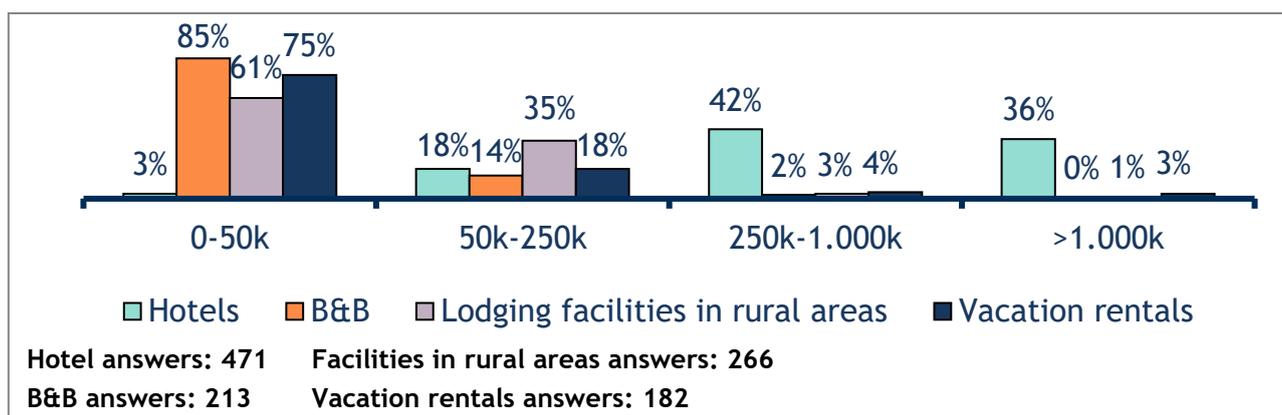
<sup>157</sup> <https://www.foodracers.com/it>

“fighting” intermediaries but simply a tool for exploiting opportunities; in fact, both accommodation facilities and restaurant activities tend to have positive opinions about online intermediaries.

## Types of accommodation facilities

Let us now have a look on how the booking channels change according to the type of accommodation facility; four cases will be considered: hotels, bed and breakfasts, lodging facilities in rural areas and vacation rentals. The purpose is to understand the differences between them and the reasons behind these differences. Moreover, this part will help to understand if the “friendly environment” emerged from the previous section is present in all the different type of accommodation facilities or only in some of them.

Anyway, before starting with the analysis, it is important taking into consideration an important difference between hotel facilities respondents and non-hotels. The formers tend to have better performance in terms of revenues (Graph 77) and so, it is possible assuming that they have higher financial resources to use.

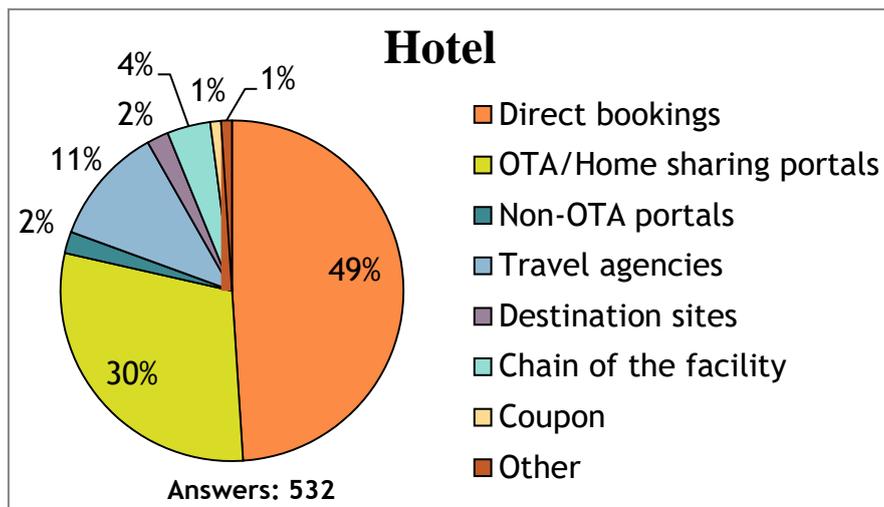


*Graph 77: ranges of the overall revenues of 2016 (comparison of different facilities)*

So, the objective is not only to understand the different booking channels but:

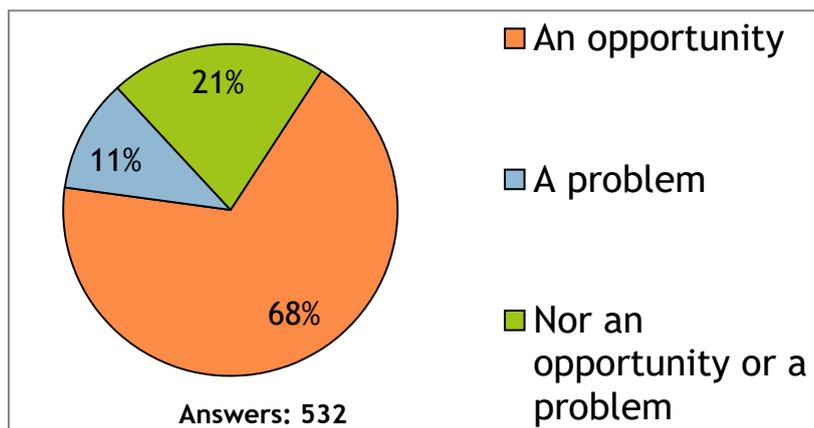
- For hotel facilities understand how they exploit their higher financial capacity. For instance, it could be interesting seeing if they use it for promoting the owned channels against OTAs.
- For the others, to understand the different ways that they try to be present online, despite the lower financial capacity. Basically, the question to answer is “*In which channels they are focusing?*”

## Hotel



Graph 78: booking channels of hotels

Starting from hotels, it is possible noticing really good performances in terms of direct bookings, with 6 percentage points more respect to the whole respondents (compare with Graph 18 in the “Booking channels” section<sup>158</sup>). Moreover, these facilities have less percentages of bookings coming from OTAs (-5 percentage points) and non-OTA portals (-4 percentage points), but more from traditional travel agencies (+4 percentage points) (Graph 78). In general, it is possible saying that these facilities are less dependent on intermediaries. However, this information should not be intended as a signal that hotels are feelings threatened by OTAs and so, they try to promote their owned channels; in fact, most of the hotels consider OTA an opportunity (Graph 79).



Graph 79: opinions of hotels about OTA

<sup>158</sup> All the compares made in this sections – also for the other types of facilities – take into consideration this graph

It is possible conjecturing that the online strategy of hotels goes in two directions: on one side exploiting OTAs as the main online intermediaries because of their visibility and on the other side, investing in promoting owned channels. As a confirm of the first direction, only the 26% of hotels<sup>159</sup> is present on non-OTA portals. The implementation of this two-directional strategy is possible thanks to the fact that hotels tend to have higher financial capacity - as stated at the beginning of the chapter – which can be used for making a strong effort in advertising: 77% of hotels<sup>160</sup> makes advertising for promoting owned channels.

Moreover, the good results of hotels in direct bookings could be related to the fact that they have the following characteristics:

- Higher presence rate of book engine<sup>161</sup>: 84% of hotel respondents have a book engine, against the 38% of the others.
- Higher presence of CRM<sup>162</sup>: 37% of hotel respondents uses CRM against the 8 % of the others

So, basically it seems that hotel facilities are very active on the promotion of online channels, while OTAs and their visibility represent an important opportunity for extra-bookings. However, hotels do not apply more comprehensive strategies, which could further enhance direct channels: only the 25% applies the Engine strategy as well as only the 8% applies the Social strategy<sup>163</sup>.

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<sup>159</sup> Answers considered: 532

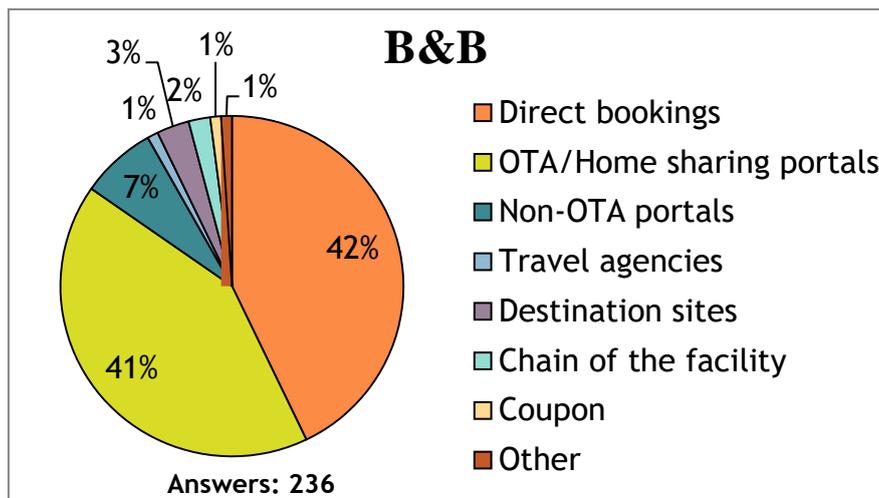
<sup>160</sup> Answers considered: 532

<sup>161</sup> Data about hotel facilities using or not using a book engine correspond to 431 respondents, while non-hotels correspond to 644

<sup>162</sup> Data about hotel facilities with CRM correspond to 532 respondents, while non-hotels correspond to 965

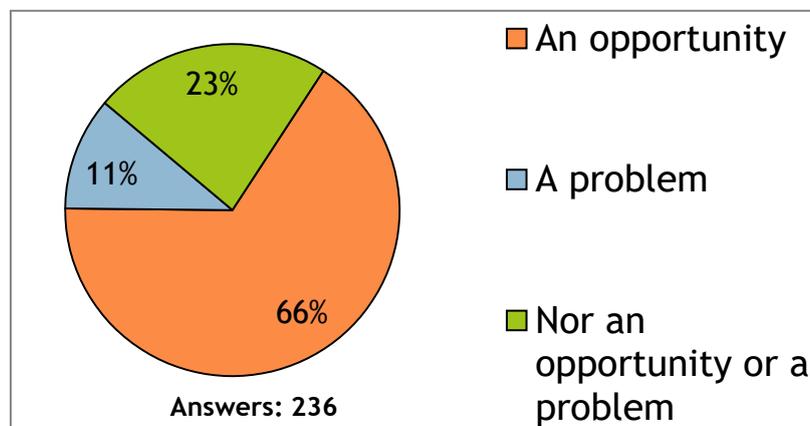
<sup>163</sup> Answers considered: 532

## Bed and breakfast



Graph 80: booking channels of bed and breakfast

Respect to the whole sample, the main differences of bed and breakfasts in the booking channels are about intermediaries: they have less percentage of bookings coming from traditional travel agencies (-6 percentage points) and more from OTAs (+6 percentage points) (Graph 80). Like many other respondents, most of bed and breakfasts consider OTAs an opportunity for their business, as shown in Graph 81.



Graph 81: opinions of bed and breakfasts about OTAs

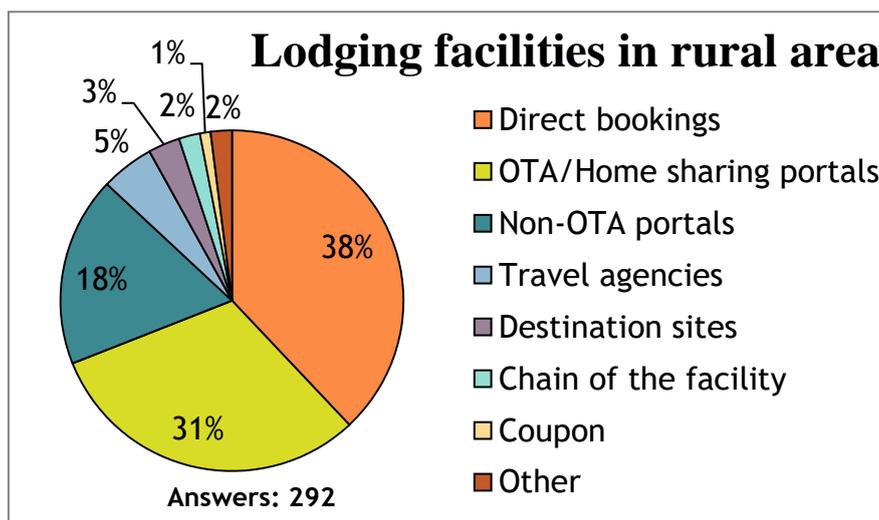
The optimism of bed and breakfast is reasonable; since they generally do not have high financial capacity, they prefer not to invest in advertising – that is made only by the 25%<sup>164</sup> - but to increase

<sup>164</sup> Answers considered: 236

the visibility through OTAs. As an alternative, bed and breakfast could exploit other non-OTA portals (e.g. a metasearch like Trivago) but this choice is made only by the 22%.

Probably the preference for OTAs over other portals is linked to the fact that the formers allow to have high visibility and pay for that visibility only when there is a booking.

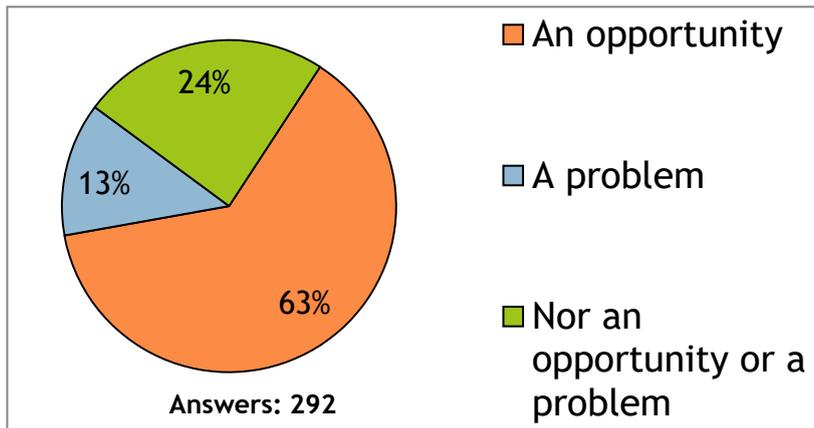
### *Lodging facilities in rural areas*



*Graph 82: booking channels of lodging facilities in rural areas*

Let us now consider lodging facilities in rural areas. Respect to the whole respondents, they have lower portion of bookings coming from OTA (-4 percentage points), but despite of this, their direct bookings are not better (-5 percentage points), because they are very dependent on non-OTA portals, which represent the 18% of the total bookings (+12 percentage points) (Graph 82). Lodging facilities in rural areas have several characteristics in common with bed and breakfasts: the low financial capacity, the low use of advertising for promoting owned channels (used by only the 28% of respondents<sup>165</sup>) and the high positiveness about OTAs (Graph 83).

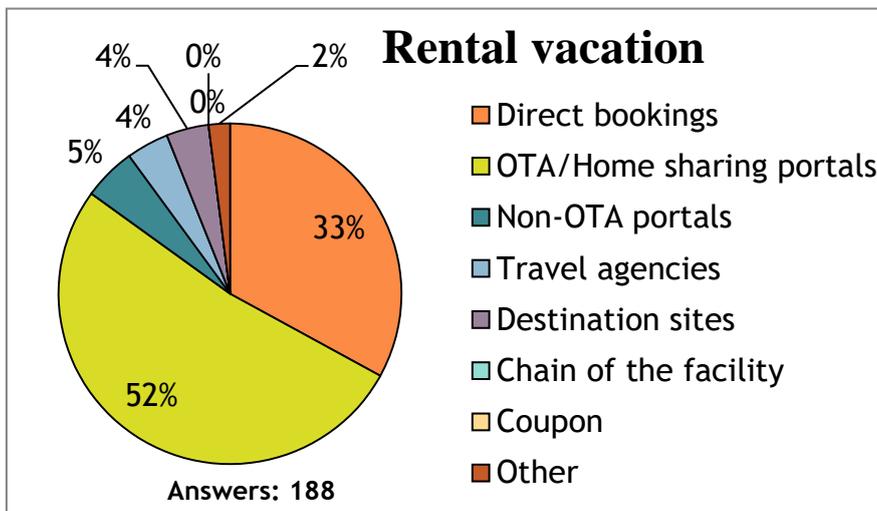
<sup>165</sup> Answers considered: 292



Graph 83: opinion of lodging facilities in rural areas about OTAs

However, the two types of accommodation facilities have a different approach to online activities: it is true that they both do not make advertising of their channels, but lodging facilities in rural areas tend to be more present also in other portals (46% of them<sup>166</sup>, affirms to be present in non-OTA portals) and that is the reason why they have high portion of bookings coming from them. An example of these portals is Agriturismo.it.

### Rental vacations

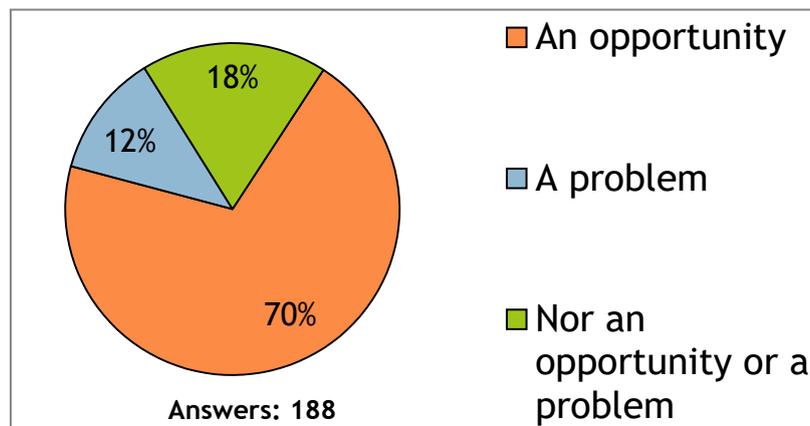


Graph 84: booking channels of rental vacations

The last type of accommodation facilities to consider are vacation rentals, which present the worst performance in direct bookings with -10 percentage points respect to the whole sample (Graph 84).

<sup>166</sup> Answers considered: 292

It looks like these facilities are strongly dependent on OTAs and in fact their opinions about these intermediaries is strongly positive, even more than in the other facilities (Graph 85)



*Graph 85: opinion of vacation rentals about OTAs*

Moreover, these facilities do not seem to be interested in promoting their owned channels – only the 15% makes advertising<sup>167</sup> - or to use other non-OTA portals – only the 19% exploits other portals<sup>168</sup> -.

Basically, the approach of vacation rentals is similar to the one of bed and breakfast, with even a more dependency on OTAs, which is probably related to the fact that the popularity of this form of vacation has its roots in the field of home sharing portals – which is basically OTAs for vacation rentals - and in sharing economy more in general. However, it is not excluded that in the future, this business will be more present also in other channels. For instance, B2Book.net<sup>169</sup> is an Italian start up that has developed a portal where travel agencies and tour operators can book vacation rentals for their customers: basically, it works exactly like Airbnb or any other home sharing portals, but in a B2B logic.

### *To sum up*

At the end of this analysis, it has emerged that all the types of accommodation facilities presented, tend to perceive OTAs as an opportunity, but because of different characteristics their online activities present some differences. Thanks to their financial capacity, hotels tend to promote their own channels through advertising and seems to prefer OTAs to other portals. On the other side, bed and

<sup>167</sup> Answers considered: 188

<sup>168</sup> Answers considered: 188

<sup>169</sup> <https://www.b2book.net/en/buyer>

breakfasts, lodging facilities in rural areas and vacation rentals have lower financial capacity and so tend to have a different approach; in fact, all of them seems not to be so interested in promoting owned channels. The online activity of bed and breakfast is strictly linked to OTAs, in fact they generally are not so interested in other portals; and this is probably related to the fact that OTAs ask for payment only when there is a booking. OTAs are important also for lodging facilities in rural areas, which tend to use also other portals (e.g. Agriturismo.it); finally, vacation rentals are the facilities that are more dependent on OTA and this is probably because their popularity is strictly linked to them.

## Final considerations

As a conclusion of the empirical analysis, it could be useful to recall what are the main elements that have emerged from the investigation.

First of all, the analysis showed that the attitude toward digital channels is not homogeneous: restaurant activities are still very linked to non-digital channels and the role of third parties is minimum (8% of the total bookings on average); while for accommodation facilities digital channels are very relevant for both direct and indirect channels, which represent on average the 57% of total bookings.

Then, the analysis of the booking channels leads to investigate how the actors of the hospitality manage their own digital channels. From this investigation, it resulted that both accommodation facilities and restaurant activities are very present online through websites and social network accounts, but the advertising activities, aimed at creating traffic on them, are not very diffused. Thus, it was conjectured that advertising is not perceived very effective, because it may need to be supported by other tools and instruments, in order to transform traffic into bookings; like: the presence of a book engine, the continuous monitoring of social network accounts, the optimisation of the website for mobile and so on. However, integrating the advertising with these activities, in more comprehensive strategies (e.g. advertising on search engine matched with the presence of a book engine), seems to really have a positive impact on the online direct channels. Nevertheless, sometimes the application of a comprehensive strategy showed also to be correlated with a decrease of offline direct bookings that might compromise the overall direct reservations. All these considerations lead to the conclusion that integrating advertising with other tools and activities, can help to improve the bookings from online direct channels, but the management of these channels requires time, and this time may be “steal” to traditional channels, with the risk of compromising them.

Another element emerged from the investigation is that also digital technologies for the management of the operations can have an impact on direct bookings. In particular the software for the Web analytics seems to be correlated to an increase of the impact of digital direct bookings, thanks to the fact that it can support the planning of the online marketing campaign and the better allocation of the budget. On the other side, business intelligence analytics seems to be more related to revenues rather than bookings and the impact of CRM on direct bookings is not so strong; so, maybe it is better to integrate CRM with other activities. The analysis of the digital technologies also showed that accommodation facilities more linked to business travel tend to implement innovative solutions more than the others. So, it is possible assuming that also the characteristics of the customer base of an accommodation facility can influence the adoption of new technology for the management of the operations.

Then, the analysis moved to the relationship with Internet companies and it is possible affirming that offline actors tend to generally perceive the online ones positively. First of all, the 66% of accommodation facilities considers OTAs an opportunity and it is possible conjecturing that behind this positiveness there might be also the billboard effect: in fact, the 76% of respondents affirms that OTAs have also improved their direct bookings. Furthermore, it looks like the facilities affirming that OTAs do not improve their direct bookings, use a book engine and/or accept prepaid cards for booking less than those that assess the improvement. Thus, it is possible conjecturing that for exploiting the billboard effect, being present on OTAs is not enough, but it is important having instruments that allow to collect direct bookings easily. The actors of the Italian hospitality industry seem also to be positive about review portals, which are considered an opportunity by the 56% of accommodation facilities and the by the 49% of restaurant activities. Anyway, there are also negative opinions: the 18% of accommodation facilities considers these portals a problem, as well as the 28% of restaurant activities; and most of the complaints are about the lack of control on the reviews. However, it looks like answering negative reviews might help; in fact, those applying this practice seem to be more optimistic about the portals: in this case, the percentage of respondents considering review portals an opportunity is higher of 7 percentage points in accommodation facilities and of 11 percentage points in the restaurant activities. Among restaurant activities also the applications/portals about food are becoming very popular: the 52% of respondents is present in at least one of them and the most diffused seem to be those concerning with the findings of restaurants, helped by reviews. The second most diffused are apps/portals for the online table reservation, which are considered an opportunity by the 27%, and the percentage is higher of 19 percentage points considering restaurant

activities that use them. Thus, the positiveness is high, also despite the fact that the restaurant activities using these apps have a slight lower percentage of direct bookings. It is possible conjecturing that the advantages provided by online table reservations apps/portals are considered more important than the higher intermediation that they might generate. The least diffused apps are those concerning with food delivery, which are not very known by the respondents: in fact, the 19% does not know what they are. Anyway, this low awareness might be related to the fact that the providers of the service (e.g. Deliveroo, JustEat, ...) have always focused on big cities, without giving a particular attention to provinces.

The last element emerged from the investigation was that the attitude of the actors of the Italian hospitality industry towards digital channels is not homogeneous; in fact, beside the big differences in the booking channels between accommodation facilities and restaurant, there are also some dissimilarities in the different types of accommodation facilities. In fact, thanks to their financial resources, hotels tend to promote their own channels more than the others non-hotels facilities, which are more likely to exploit third online parties.

# APPENDIX

## Appendix A

### Accommodation facilities survey

# Indagine sull'Innovazione Digitale nelle Strutture Ricettive - 2017

## Indagine sull'Innovazione Digitale nelle Strutture Ricettive

**Q1: Per tenervi aggiornati sulla Ricerca e le iniziative dell'Osservatorio e per potervi escludere da eventuali solleciti a compilare la Survey, le chiediamo di completare la seguente tabella con i suoi dati.**

Nome	<input type="text"/>
Cognome	<input type="text"/>
Azienda	<input type="text"/>
Email	<input type="text"/>

**Q2: La vostra struttura ricettiva è:**

- singola, non affiliata ad alcuna catena
- parte di una catena o di una rappresentanza (specificare quale)

If you have chosen "other", please specify:

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

**Q3: Quali informazioni sui vostri clienti raccogliete e conservate in formato digitale\*?(Possibili più risposte) \***

**Un'informazione è conservata in formato digitale quando, invece che essere conservata in un archivio cartaceo, è stata salvata all'interno di un computer o di una rete informatica**

- Informazioni anagrafiche necessarie a livello legale (nome, n° documento, ...)
- Altre informazioni anagrafiche (età, professione, ...)
- Recapiti utili per ricontattare il cliente in futuro (n° telefonico, email, ...)
- Informazioni relative alle scelte d'acquisto del cliente (tipo di camera prenotata, prodotti e servizi aggiuntivi acquistati, ...)
- Informazioni aggiuntive richieste al cliente (interessi, ...)
- Non raccogliamo/conserviamo alcuna informazione in formato digitale
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

**Q4: Siete soliti inviare ai clienti comunicazioni utili, in vista del loro arrivo (ad esempio per ricordare loro la prenotazione, o l'indirizzo della vostra struttura)?(Possibili più risposte)**

- Sì, tramite telefonata o SMS
- Sì, via email
- Sì, tramite notifiche push su app
- Sì, tramite social network (Facebook, Twitter, Google+...)
- Sì, tramite sistemi di chat e messaggi istantanei (Skype, Whatsapp, Telegram)
- No
- Altro (specificare)

If you have chosen "other", please specify:

**Q5: Quando un cliente prenota in anticipo, siete soliti ricontattarlo a ridosso del viaggio per offrirgli a pagamento servizi aggiuntivi o upgrade\*? (Possibili più risposte) \*Per esempio l'accompagnamento da/per l'aeroporto, o il passaggio da mezza pensione a pensione completa, oppure una visita guidata in una località vicina, o...**

- Sì, tramite telefonata o SMS
- Sì, via email
- Sì, tramite siti/portali di prenotazione sviluppati da enti locali o privati
- Sì, tramite notifiche push su app
- Sì, tramite social network (Facebook, Twitter, Google+...)
- Sì, tramite sistemi di chat e messaggi istantanei (Skype, Whatsapp, Telegram)
- No
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

*Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3, 4, 5, 6, 8] in question 5, skip the following question*

### Q6: Quali servizi siete soliti proporre? (Possibili più risposte)

- Assicurazione per annullamento della prenotazione
- Assicurazione per la copertura di spese mediche
- Servizi di trasporto, accompagnamento
- Tour guidati
- Passaggio a un trattamento di categoria superiore (per esempio da mezza pensione a pensione completa)
- Partecipazione a corsi/eventi organizzati dalla struttura (corsi di cucina, competizioni sportive...)
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

### Q7: Siete soliti inviare comunicazioni promozionali (ad esempio info su nuove offerte) ai clienti che già avete ospitato, e di cui avete raccolto i dati di contatto? (Possibili più risposte)

- Sì, tramite posta cartacea
- Sì, tramite telefonata o SMS
- Sì, via email
- Sì, tramite messaggi sui Social Network (Facebook, Google +...)
- Sì, tramite push notification dall'applicazione
- No
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

*Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3, 4, 5, 7] in question 7, skip the following question*

**Q8: Di che tipo di comunicazioni promozionali si tratta? (Possibili più risposte)**

- Personalizzate, sulla base delle informazioni che abbiamo raccolto sul singolo cliente
- Standard, inviate a tutti indistintamente

*Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3, 4, 5, 7] in question 7, skip the following question*

**Q9: Di che tipo di comunicazioni promozionali si tratta? (Possibili più risposte)**

- Periodiche, inviate a scadenza fissa (settimanale, mensile...)
- Occasionali, inviate solamente in corrispondenza di eventuali promozioni, eventi, ricorrenze...

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

**Q10: Quali di queste attività svolgete per raccogliere riscontri, opinioni e commenti dai clienti che hanno soggiornato presso la vostra struttura? (Possibili più risposte)**

- Leggiamo le recensioni su di noi su alcuni siti (per es. TripAdvisor, Booking, ...)
- Spingiamo i nostri clienti a pubblicare le loro recensioni su questi portali
- Proponiamo ai nostri clienti questionari di valutazione del servizio ricevuto cartacei o in formato digitale
- Cerchiamo commenti e opinioni su di noi su blog e community online di viaggiatori
- Abbiamo una sezione dedicata nel nostro sito web
- Abbiamo un profilo su un social network (per es. Facebook o Twitter) che usiamo anche per la raccolta di commenti, lamentele e suggerimenti
- Non svolgiamo alcuna attività per raccogliere riscontri, opinioni e commenti
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - La gestione dei dati e della comunicazione con i clienti

**Q11: Con che frequenza rispondete alle recensioni su di voi che leggete su siti come TripAdvisor?**

	Sempre o quasi sempre	Spesso	Soltanto in alcuni casi	Quasi mai	Mai
Rispondiamo alle recensioni positive					
Rispondiamo alle recensioni negative					

## SEZIONE 2 - Le attività promozionali

**Q12: Consideriamo ora le vostre attività di promozione: quali strumenti utilizzate? (Possibili più risposte)**

- Digitali (sito internet, app, email, portali, ...)  Non digitali (comunicazioni cartacee, fiere, eventi, ...)
- Non facciamo promozione

## SEZIONE 2 - Le attività promozionali

*Note: if you have NOT answered/chosen at least one of the following items: [1] in question 12, skip the following question*

**Q13: Quali strumenti digitali utilizzate per le attività di promozione verso i vostri clienti? Quali ritenete più efficaci? (Possibili più risposte)**

	Utilizziamo	Più efficace (massimo 3 risposte)
<b>CANALI DIGITALI NON A PAGAMENTO</b>		
Sito web	<input type="checkbox"/>	<input type="checkbox"/>
Applicazione mobile	<input type="checkbox"/>	<input type="checkbox"/>
Account su social network (Facebook, ...) e su piattaforme video (Youtube, ...)	<input type="checkbox"/>	<input type="checkbox"/>
Presenza su blog, siti e community online dedicati ai viaggi	<input type="checkbox"/>	<input type="checkbox"/>
E-mail marketing verso nostri contatti	<input type="checkbox"/>	<input type="checkbox"/>
<b>CANALI ONLINE A PAGAMENTO</b>		

Advertising su motori di ricerca (Google, Bing...), per apparire tra i risultati sponsorizzati	<input type="checkbox"/>	<input type="checkbox"/>
Advertising su social network (Facebook, ...), piattaforme video (Youtube, ...)	<input type="checkbox"/>	<input type="checkbox"/>
Advertising su siti legati alla località (Appennino.it, ...)	<input type="checkbox"/>	<input type="checkbox"/>
Presenza su blog o community online dedicati ai viaggi	<input type="checkbox"/>	<input type="checkbox"/>
Presenza su siti di coupon o cofanetti regalo (Groupon, Smartbox, ...)	<input type="checkbox"/>	<input type="checkbox"/>
Presenza su portali tematici verticali per tipologia di struttura (Agriturismo.it, ...)	<input type="checkbox"/>	<input type="checkbox"/>
E-mail marketing	<input type="checkbox"/>	<input type="checkbox"/>
Presenza sulle OTA (Booking, Casevacanza.it, Expedia, Homeaway, ...)	<input type="checkbox"/>	<input type="checkbox"/>
Presenza attiva sui siti di recensione e metasearch (TripAdvisor, Trivago, ...)	<input type="checkbox"/>	<input type="checkbox"/>

## SEZIONE 2 - Le attività promozionali

Note: if you have NOT answered/chosen at least one of the following items: [(2, 3)] in question 13, skip the following question

**Q14: Il vostro sito web &grave; dotato di un sistema di prenotazioni on-line che abilita a controllare la disponibilit&agrave; di stanze con le relative tariffe ed eventualmente prenotare direttamente?**

SÌ  No

## SEZIONE 2 - Le attività promozionali

Note: if you have NOT answered/chosen at least one of the following items: [(2, 5)] in question 13, skip the following question

**Q15: Su quali social network avete un vostro profilo? (Possibili più risposte)**

- |   |  |
|---|--|
| <input type="checkbox"/> Facebook                                 | <input type="checkbox"/> Twitter             |
| <input type="checkbox"/> LinkedIn                                 | <input type="checkbox"/> Instagram           |
| <input type="checkbox"/> Google+                                  | <input type="checkbox"/> Snapchat            |
| <input type="checkbox"/> Pinterest                                | <input type="checkbox"/> VKontakte           |
| <input type="checkbox"/> Non abbiamo un profilo su social network | <input type="checkbox"/> Altro (specificare) |

If you have chosen "other", please specify:

## EZIONE 2 - Le attività promozionali

Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3, 4, 5, 6, 7, 8, 10] in question 15, skip the following question

**Q16: Quanto tempo spendete ogni settimana sui social network?**

- Da 0 a 3 ore/settimana     Da 3 a 6 ore/settimana     Da 6 a 9 ore/settimana     Più di 9 ore/settimana

Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3, 4, 5, 6, 7, 8, 10] in question 15, skip the following question

**Q17: Ritenete che il tempo che dedicate ai social network sia sufficiente per un utilizzo efficace dello strumento?**

- Sì  
 No, ma non abbiamo a disposizione personale/tempo ulteriore da dedicare allo strumento  
 No, ma preferiamo concentrare le nostre risorse su altro  
 No, ma dedichiamo poco tempo perché la nostra clientela non è interessata al canale social

## SEZIONE 3 - La ricezione delle prenotazioni

**Q18: Posto a cento il numero di prenotazioni che ricevete, potreste indicare approssimativamente la loro provenienza?**

Direttamente dal cliente finale, o dalla sua azienda, senza ulteriori intermediari	<input type="text"/>	%
Tramite la catena cui siamo affiliati (per strutture in networking)	<input type="text"/>	%
Tramite OTA (Booking, Edreams, TripAdvisor, ...) o portali di Home Sharing/Home Rental che abilitano direttamente la prenotazione (Airbnb, Casevacanza.it, Homeaway, ...)	<input type="text"/>	%
Tramite aggregatori e portali che non abilitano direttamente la prenotazione (Agriturismo.it, Trivago, ...)	<input type="text"/>	%

Tramite coupon o cofanetti regalo (Smartbox, Groupon, ...)		%
Tramite Agenzie di Viaggio tradizionali (ADV), Tour Operator e grossisti		%
Siti/portali/app di prenotazione della destinazione turistica sviluppati da enti locali o privati		%
Altro (specificare)		%
TOTALE PRENOTAZIONI RICEVUTE:	100	%

### SEZIONE 3 - La ricezione delle prenotazioni

**Q19: Posto a cento il numero di prenotazioni che ricevete direttamente dal cliente finale, o dalla sua azienda, potreste indicare approssimativamente la loro provenienza, in percentuale?**

(Se non ricevete prenotazioni direttamente dal cliente finale, scrivere 100 nella casella 'Non riceviamo prenotazioni direttamente dal cliente finale')

Direttamente al banco, al momento dell'arrivo (walk-in)	<input type="text"/>	%
Tramite altri canali non digitali: per telefono, via fax, al banco (ma con anticipo), ...	<input type="text"/>	%
Via email	<input type="text"/>	%
Tramite il nostro sito WEB	<input type="text"/>	%
Tramite la nostra applicazione per smartphone e/o tablet	<input type="text"/>	%
Tramite uno dei nostri profili sui social network (Facebook, Google +, ...)	<input type="text"/>	%
Non riceviamo prenotazioni direttamente dal cliente finale	<input type="text"/>	%
Altro (specificare)	<input type="text"/>	%
<input type="text"/>		
	_____	
TOTALE PRENOTAZIONI RICEVUTE DIRETTAMENTE DAL CLIENTE:	100	%

### SEZIONE 3 - La ricezione delle prenotazioni

**Q20: In caso di cancellazione delle prenotazioni, applicate una penale?**

- Sì, in percentuale fissa  
 Sì, in percentuale variabile in funzione della stagionalità e/o di politiche promozionali  
 No

**Q21: Accettate carte prepagate per le prenotazioni e i pagamenti?**

- Sì, sia per le prenotazioni che per i pagamenti                       Sì, ma solo per i pagamenti  
 No     Altro (specificare)

If you have chosen "other", please specify:

### **SEZIONE 3 - La ricezione delle prenotazioni**

**Q22: Fatto 100 il vostro fatturato per l'anno 2016, indicate approssimativamente la percentuale di fatturato derivante dai viaggi d'affari\* e da MeetingandGruppi Aziendali.\*Viaggi d'affari: si intende viaggi che avvengono per motivi di lavoro, detti anche viaggi business, B2B o viaggi d'affari.**

- 0%                      Tra 1% e 20%                      Tra 21% e 40%                      Tra 41% e 60%                      Tra 61% e 80%  
 Tra 81% e 99%                      100%

### **SEZIONE 3 - La ricezione delle prenotazioni**

**Q23: Siete presenti sulle OTA (Booking, Expedia, ...) o sui portali di Home Sharing/Home Rental che abilitano direttamente la prenotazione (Airbnb, Casevacanza.it, Homeaway, ...)**

- Sì     No

### **SEZIONE 3 - La ricezione delle prenotazioni**

*Note: if you have NOT answered/chosen item [1] in question 23, skip the following question*

**Q24: Ritenete che la presenza sulle OTA (Booking, Expedia, ...) o sui portali di Home Sharing/Home Rental che abilitano direttamente la prenotazione (Airbnb, Casevacanza.it, Homeaway, ...) abbia fatto crescere il numero di prenotazioni?**

- Sì, sia di quelle intermedie sia di quelle dirette, grazie alla visibilità che ci danno  
 Sì, solo di quelle intermedie, mentre quelle dirette sono diminuite o invariate  
 No  
 Non so rispondere

*Note: if you have NOT answered/chosen item [1] in question 23, skip the following question*

**Q25: Approssimativamente, che percentuale del transato avete corrisposto alle OTA (Booking, Expedia, ...) o ai portali di Home Sharing/Home Rental che abilitano direttamente la prenotazione (Airbnb, Casevacanza.it, Homeaway, ...) come commissioni nel 2016?**

- 0-10%     11-15%     16-20%     21-25%     26-30%     Oltre 30%

### SEZIONE 3 - La ricezione delle prenotazioni

**Q26: Pensate che le OTA (Booking, Expedia&hellip;) o i portali di Home Sharing/Home Rental che abilitano direttamente la prenotazione (Airbnb, Casevacanza.it, Homeaway, ...) rappresentino pi&ugrave; un problema o un&rsquo;opportunit&agrave; per la vostra struttura?**

- Un problema     Un'opportunità     Nessuno dei due

### SEZIONE 3 - La ricezione delle prenotazioni

*Note: if you have NOT answered/chosen item [1] in question 26, skip the following question*

**Q27: Quali sono i motivi principali per cui le OTA (Booking, Expedia&hellip;) o i portali di Home Sharing/Home Rental che abilitano direttamente la prenotazione (Airbnb, Casevacanza.it, Homeaway, ...) rappresentano un problema per la vostra struttura? (Massimo 3 risposte)**

- I costi che impongono sono troppo alti ma ormai non se ne può fare a meno per avere visibilità
- Offrono la possibilità di cancellare una prenotazione senza penali e questo incrementa il numero di cancellazioni da parte dei clienti
- Alcuni portali non passano tutte le informazioni utili sui clienti alla struttura. In caso di problemi, il proprietario della struttura non può contattare direttamente il cliente
- E' molto difficile riuscire a comunicare con loro quando insorgono problemi o si desidera rescindere il contratto
- Non cancellano dal portale le strutture che hanno deciso di rescindere il contratto, in questo modo possono comparire tra i primi risultati durante la ricerca diretta sul web (riducendo le prenotazioni dirette della struttura) e la struttura risulterà non prenotabile sul portale
- Sono troppo dalla parte dell'utente e poco dalla parte della struttura ricettiva che, per esempio, non può replicare alle recensioni
- La parity rate\* impone dei vincoli alla nostra libertà commerciale
- Abbiamo dovuto ridurre le tariffe per rimanere competitivi sul mercato
- L'allotment\*\* ci causa problemi di overbooking e ci impedisce di disporre al meglio di tutte le nostre camere
- Altro (specificare)

If you have chosen "other", please specify:

*\*La parity rate è quella regola imposta da molte Agenzie di Viaggio Online in base alla quale lo stesso servizio per la stessa notte non può essere offerto altrove ad un prezzo minore.*

*\*\*Allotment: accordo con le OTA che prevede di riservare loro in anticipo la vendita di una o più camere*

### SEZIONE 4 - Gli altri vostri strumenti digitali

**Q28: Pensate che i portali di recensione come TripAdvisor rappresentino più un problema o un'opportunità per la vostra struttura?**

- Un problema       Un'opportunità       Nessuno dei due

### SEZIONE 4 - Gli altri vostri strumenti digitali

*Note: if you have NOT answered/chosen item [1] in question 28, skip the following question*

**Q29: Quali sono i motivi principali per cui i portali di recensione come TripAdvisor rappresentano un problema per la vostra struttura? (Massimo 3 risposte)**

- Mantenere il profilo aziendale è troppo costoso
- L'assenza di controlli sulle recensioni può causare concorrenza sleale o danneggiare la reputazione delle strutture
- È impossibile stabilire se un cliente ha frequentato effettivamente la struttura
- È difficile poter rispondere alle recensioni
- È possibile acquistare sul mercato pacchetti di recensioni positive e credibili per incrementare la propria reputazione
- Il turista acquisisce potere contrattuale nei confronti della struttura. Sono frequenti le "minacce" dei clienti di recensioni negative in cambio di sconti o benefici
- Altro (specificare)

If you have chosen "other", please specify:

### SEZIONE 4 - Gli altri vostri strumenti digitali

**Q30: Mettete a disposizione dei vostri clienti una connessione ad internet senza fili (wi-fi)?**

- Sì, la connessione wi-fi è disponibile e automaticamente inclusa in ogni prenotazione
- Sì, la connessione wi-fi è disponibile, ma almeno in alcuni casi va pagata a parte, come un servizio extra
- No, non mettiamo a disposizione dei clienti una connessione wi-fi

## SEZIONE 4 - Gli altri vostri strumenti digitali

**Q31: All'interno della vostra struttura ricettiva sono presenti dei televisori nelle camere? (Possibili più risposte)**

- Sì, TV tradizionali
- Sì, smart TV (TV con funzione di connessione ad internet)
- No

## SEZIONE 4 - Gli altri vostri strumenti digitali

*Note: if you have NOT answered/chosen at least one of the following items: [1, 2] in question 31, skip the following question*

**Q32: Quali contenuti televisivi possono vedere i suoi ospiti nelle camere? (Possibili più risposte)**

- Le TV generaliste e i canali del digitale terrestre in chiaro
- I canali delle Pay TV (SKY, Mediaset Premium, Fox, ...)
- Canali satellitari in chiaro (Aljazeera, Bloomberg, CNBC, ...)
- I contenuti delle offerte online (Netflix, NowTv, Infinity, TIMvision...)
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 4 - Gli altri vostri strumenti digitali

**Q33: Ritenete interessante per i vostri ospiti poter usufruire dei contenuti satellitari della Pay TV scaricabili on demand sulla televisione in camera?**

- Molto
- Abbastanza
- Poco
- Per nulla
- Non so rispondere

**Q34: Ritenete interessante per i vostri ospiti poter usufruire dei contenuti satellitari della Pay TV?**

- Molto
- Abbastanza
- Poco
- Per nulla
- Non so rispondere

## SEZIONE 4 - Gli altri vostri strumenti digitali

**Q35: Quali strumenti digitali hanno sviluppato gli enti pubblici e privati del vostro territorio (Associazioni, Consorzi, &hellip;) a supporto delle iniziative turistiche? Su quali di questi siete presenti?**

	Non sono stati sviluppati	Sono stati sviluppati e siamo presenti	Sono stati sviluppati ma non siamo presenti
Siti di informazione sul territorio (mostre/eventi, mezzi di trasporto, ...)			
Siti di prenotazione e acquisto di alloggi e altri servizi turistici gestiti da <input type="radio"/> associazioni/consorzi di albergatori, etc.	<input type="radio"/>	<input type="radio"/>	
Siti di e-commerce di prodotti tipici	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
App della destinazione	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Carte turistiche della destinazione ( per ingressi scontati a musei, mezzi di <input type="radio"/> trasporto...)	<input type="radio"/>	<input type="radio"/>	
Software di Business Intelligence e CRM collaborativo			
Account condivisi su social network (Facebook, Twitter), gestiti da <input type="radio"/> associazioni/consorzi ...	<input type="radio"/>	<input type="radio"/>	
App con borsellino elettronico per il pagamento dei servizi della destinazione			
Tecnologia di prossimità (Beacon, ...) che consente al turista di ricevere informazioni e notifiche push avvicinandosi ai punti di interesse			
Altro (specificare)			

## SEZIONE 4 - Gli altri vostri strumenti digitali

**Q36: Quali delle seguenti tecnologie sono presenti e utilizzate dalla vostra struttura oppure la struttura è interessata a introdurre?**

	Presente	Verrà introdotta nei prossimi 12 mesi	Interessa ma al momento l'investimento non è prioritario/realizzabile	Non interessa	Non so cosa sia
Strumenti per l'accettazione di pagamenti elettronici (per ricevere pagamenti con carta di credito/debito)					
Sistemi per l'integrazione con i canali di distribuzione online (OTA, GDS)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CRM (Customer Relationship Management)					
CRS (Central Reservation System) per la gestione delle prenotazioni (disponibilità, tariffe, ...) nei diversi canali di distribuzione	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

PMS (Property Management System) per gestione delle prenotazioni nei diversi canali, check-in e check-out, profilazione dei clienti, gestione personale e contabilità

RMS (Revenue Management System) per trovare la migliore strategia tariffaria, sulla base della disponibilità e degli schemi di pernottamento degli ospiti

Software per la contabilità

Software di web analytics per l'analisi delle attività della struttura su internet

Sistemi di Business Intelligence Analytics (per l'analisi di grandi moli di dati) e/o di marketing intelligence (sugli sviluppi dell'ambiente di mercato circostante)

Sistemi di Building Automation (video-reception per il check-in, device mobili in dotazione del personale...)

Soluzioni Cloud per software (contabilità, gestione paghe...) o componenti hardware (server)

## SEZIONE 5 – L’impatto delle nuove tecnologie

**Q37: Quali difficoltà avete riscontrato nell'introduzione complessiva degli strumenti digitali? (Possibili più risposte)**

- Nessuna difficoltà, anzi ha facilitato il nostro lavoro
- Investimenti e costi elevati
- Mancanza di tempo per presidiare efficacemente tutti i canali
- Mancanza di formazione del personale
- Difficoltà ad interagire con gli strumenti digitali da parte di un segmento di clienti
- Scarsa conoscenza dei fornitori su problematiche ed esigenze delle strutture ricettive
- Altro (specificare)

If you have chosen "other", please specify:

*Il questionario è quasi concluso. In questa ultima sezione vi verranno richieste informazioni sul vostro ruolo e sulle caratteristiche della struttura.*

## SEZIONE 6 - L'anagrafica della struttura ricettiva

**Q38: Che tipo di struttura siete?**

- |   |   |   |
|---|---|---|
| <input type="radio"/> Hotel               | <input type="radio"/> Pensione            | <input type="radio"/> Residence               |
| <input type="radio"/> Ostello             | <input type="radio"/> Villaggio turistico | <input type="radio"/> Agriturismo             |
| <input type="radio"/> B&B                 | <input type="radio"/> Camping             | <input type="radio"/> Gestore di case vacanza |
| <input type="radio"/> Altro (specificare) |   |   |

If you have chosen "other", please specify:

**Q39: Quante stelle ha la vostra struttura?**

- |                                     |   |
|-------------------------------------|---|
| <input type="radio"/> Una stella    | <input type="radio"/> Due stelle                              |
| <input type="radio"/> Tre stelle    | <input type="radio"/> Quattro stelle                          |
| <input type="radio"/> Cinque stelle | <input type="radio"/> Non applicabile (specificare il motivo) |

If you have chosen "other", please specify:

**Q40: In quale provincia si trova la vostra struttura?**

- |  |   |                                     |   |
|--|---|-------------------------------------|---|
| <input type="radio"/> Agrigento            | <input type="radio"/> Alessandria           | <input type="radio"/> Ancona        | <input type="radio"/> Aosta                 |
| <input type="radio"/> Arezzo               | <input type="radio"/> Ascoli Piceno         | <input type="radio"/> Asti          | <input type="radio"/> Avellino              |
| <input type="radio"/> Bari                 | <input type="radio"/> Barletta-Andria-Trani | <input type="radio"/> Belluno       | <input type="radio"/> Benevento             |
| <input type="radio"/> Bergamo              | <input type="radio"/> Biella                | <input type="radio"/> Bologna       | <input type="radio"/> Bolzano               |
| <input type="radio"/> Brescia              | <input type="radio"/> Brindisi              | <input type="radio"/> Cagliari      | <input type="radio"/> Caltanissetta         |
| <input type="radio"/> Campobasso           | <input type="radio"/> Carbonia-Iglesias     | <input type="radio"/> Caserta       | <input type="radio"/> Catania               |
| <input type="radio"/> Catanzaro            | <input type="radio"/> Chieti                | <input type="radio"/> Como          | <input type="radio"/> Cosenza               |
| <input type="radio"/> Cremona              | <input type="radio"/> Crotone               | <input type="radio"/> Cuneo         | <input type="radio"/> Enna                  |
| <input type="radio"/> Fermo                | <input type="radio"/> Ferrara               | <input type="radio"/> Firenze       | <input type="radio"/> Foggia                |
| <input type="radio"/> Forlì-Cesena         | <input type="radio"/> Frosinone             | <input type="radio"/> Genova        | <input type="radio"/> Gorizia               |
| <input type="radio"/> Grosseto             | <input type="radio"/> Imperia               | <input type="radio"/> Isernia       | <input type="radio"/> L'Aquila              |
| <input type="radio"/> La Spezia            | <input type="radio"/> Latina                | <input type="radio"/> Lecce         | <input type="radio"/> Lecce                 |
| <input type="radio"/> Livorno              | <input type="radio"/> Lodi                  | <input type="radio"/> Lucca         | <input type="radio"/> Macerata              |
| <input type="radio"/> Mantova              | <input type="radio"/> Massa-Carrara         | <input type="radio"/> Matera        | <input type="radio"/> Medio Campidano       |
| <input type="radio"/> Messina              | <input type="radio"/> Milano                | <input type="radio"/> Modena        | <input type="radio"/> Monza e della Brianza |
| <input type="radio"/> Napoli               | <input type="radio"/> Novara                | <input type="radio"/> Nuoro         | <input type="radio"/> Ogliastra             |
| <input type="radio"/> Olbia-Tempio         | <input type="radio"/> Oristano              | <input type="radio"/> Padova        | <input type="radio"/> Palermo               |
| <input type="radio"/> Parma                | <input type="radio"/> Pavia                 | <input type="radio"/> Perugia       | <input type="radio"/> Pesaro e Urbino       |
| <input type="radio"/> Pescara              | <input type="radio"/> Piacenza              | <input type="radio"/> Pisa          | <input type="radio"/> Pistoia               |
| <input type="radio"/> Pordenone            | <input type="radio"/> Potenza               | <input type="radio"/> Prato         | <input type="radio"/> Ragusa                |
| <input type="radio"/> Ravenna              | <input type="radio"/> Reggio Calabria       | <input type="radio"/> Reggio Emilia | <input type="radio"/> Rieti                 |
| <input type="radio"/> Rimini               | <input type="radio"/> Roma                  | <input type="radio"/> Rovigo        | <input type="radio"/> Salerno               |
| <input type="radio"/> Sassari              | <input type="radio"/> Savona                | <input type="radio"/> Siena         | <input type="radio"/> Siracusa              |
| <input type="radio"/> Sondrio              | <input type="radio"/> Taranto               | <input type="radio"/> Teramo        | <input type="radio"/> Terni                 |
| <input type="radio"/> Torino               | <input type="radio"/> Trapani               | <input type="radio"/> Trento        | <input type="radio"/> Treviso               |
| <input type="radio"/> Trieste              | <input type="radio"/> Udine                 | <input type="radio"/> Varese        | <input type="radio"/> Venezia               |
| <input type="radio"/> Verbano-Cusio-Ossola | <input type="radio"/> Vercelli              | <input type="radio"/> Verona        | <input type="radio"/> Vibo Valentia         |
| <input type="radio"/> Vicenza              | <input type="radio"/> Viterbo               |                                     |   |

**SEZIONE 6 - L'anagrafica della struttura ricettiva**

**Q41: Qual è il suo ruolo all'interno della struttura?**

- |   |   |                                 |
|---|---|---------------------------------|
| <input type="radio"/> Titolare o familiare del titolare | <input type="radio"/> Direttore           | <input type="radio"/> Impiegato |
| <input type="radio"/> Consulente esterno                | <input type="radio"/> Altro (specificare) |                                 |

If you have chosen "other", please specify:



**Q46: Potreste indicare per il fatturato dell'anno 2017 una stima di crescita/decrecita prevista rispetto al 2016?**

- Oltre -10%       Tra -10% e -5%       Tra -5% e 0       Tra 0 e +5%       Tra +5% e +10%
- Oltre +10%

# Appendix B

## Restaurant activities survey

# Indagine sull'Innovazione Digitale nelle Attività Ristorative - 2017

Indagine sull'Innovazione Digitale nelle Attività Ristorative

**Q1: Per tenervi aggiornati sulla Ricerca e sulle iniziative dell'Osservatorio e per potervi escludere da eventuali solleciti a compilare la Survey, le chiediamo di completare la seguente tabella con i suoi dati.**

Nome	<input type="text"/>
Cognome	<input type="text"/>
Azienda	<input type="text"/>
Email	<input type="text"/>

NOTA: In ogni momento è possibile salvare le risposte date attraverso il pulsante "salva". Per completare il questionario in un secondo momento occorre solo indicare un indirizzo email al quale si desidera ricevere il link per completare il questionario senza perdere le risposte già date.

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

**Q2: Quali mezzi di comunicazione digitali adottate per promuovere il vostro locale? (Possibili più risposte)**

- Sito web del locale o del gruppo
- Applicazione mobile del locale o del gruppo
- Account su social network e #Hastag del locale
- Presenza su blog, siti e community online dedicati alla ristorazione
- E-mail marketing
- SMS, messaggi Whatsapp o Telegram
- Scheda del locale su Google MyBusiness (scheda di un'attività commerciale sulle mappe di Google)
- Pubblicità su motori di ricerca (Google, Bing, ...), per apparire tra i risultati sponsorizzati
- Pubblicità su social network (Facebook, ...) o piattaforme video (Youtube, ...)
- Pubblicità su siti legati alla località
- Presenza su applicazioni o portali dedicati alla ristorazione (2Spaghi, TheFork, ...)
- Presenza su siti di coupon (Groupon, Groupalia, ...)
- Presenza su cofanetti regalo (Smartbox, Wonderbox, ...)
- Presenza attiva su siti o applicazioni di recensione e metasearch (TripAdvisor, ...)
- Nessuno
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

Note: if you have NOT answered/chosen at least one of the following items: [11, 14] in question 2, skip the following question

**Q3: In particolare, in quali applicazioni o portali è presente il vostro locale? (Possibili più risposte)**

- |   |  |                                   |                                    |
|---|--|-----------------------------------|------------------------------------|
| <input type="checkbox"/> App della città/località | <input type="checkbox"/> TripAdvisor         | <input type="checkbox"/> 2Spaghi  | <input type="checkbox"/> MiSiedo   |
| <input type="checkbox"/> Yelp                     | <input type="checkbox"/> Qype                | <input type="checkbox"/> TheFork  | <input type="checkbox"/> Quandoo   |
| <input type="checkbox"/> Cibando                  | <input type="checkbox"/> Zomato              | <input type="checkbox"/> Just Eat | <input type="checkbox"/> Deliveroo |
| <input type="checkbox"/> Foodora                  | <input type="checkbox"/> Altro (specificare) |                                   |                                    |

If you have chosen "other", please specify:

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

Note: if you have NOT answered/chosen all of the following items: [2] in question 2, skip the following question

**Q4: In particolare, quali funzionalità e quali informazioni relative al vostro locale si possono trovare sulla vostra applicazione mobile? (Possibili più risposte)**

- Chat
- Possibilità di prenotare online un tavolo
- Possibilità di ordinare online cibo da asporto
- Possibilità di recensire il locale
- Possibilità di contattare telefonicamente il locale
- Mappa interattiva su come raggiungere il locale
- Immagini e video del locale e dei piatti
- Menù con i prezzi dei piatti
- Sezione blog con news, offerte ed eventi
- Collegamento agli account social network del locale
- Invio di promozioni lampo (voucher, coupon, ...) e inviti in tempo reale tramite notifica push
- Carta fedeltà in app per raccogliere punti
- Presenza del Wi-Fi nel locale
- Presenza della TV per la visione di eventi sportivi
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

Note: if you have NOT answered/chosen all of the following items: [1] in question 2, skip the following question

**Q5: Il vostro sito web è ottimizzato per essere visualizzato bene da smartphone?**

- Sì       No       Non lo so

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

Note: if you have NOT answered/chosen all of the following items: [1] in question 2, skip the following question

**Q6: In particolare, quali funzionalità e quali informazioni relative al vostro locale si possono trovare sul vostro sito web? (Possibili più risposte)**

- Chat
- Possibilità di prenotare online un tavolo
- Possibilità di ordinare online cibo da asporto
- Possibilità di recensire il locale
- Possibilità di contattare telefonicamente il locale
- Collegamento a Google Map per fornire le indicazioni stradali su come arrivare al locale

- eCommerce per la vendita dei prodotti "della casa"
- Immagini e video del locale e dei piatti
- Menù con i prezzi dei piatti
- Collegamento a un sito di recensione (TripAdvisor, 2Spaghi, ...)
- Sezione blog con news, offerte ed eventi
- Collegamento agli account social network del locale
- Video tutorial delle ricette presenti sul menù
- Presenza del Wi-Fi nel locale
- Presenza della TV per la visione di eventi sportivi
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

*Note: if you have NOT answered/chosen all of the following items: [3] in question 2, skip the following question*

**Q7: Su quali social network avete un vostro profilo? (Possibili più risposte)**

- |  |                                  |                                    |                                   |
|--|----------------------------------|------------------------------------|-----------------------------------|
| <input type="checkbox"/> Facebook            | <input type="checkbox"/> Twitter | <input type="checkbox"/> MySpace   | <input type="checkbox"/> LinkedIn |
| <input type="checkbox"/> Instagram           | <input type="checkbox"/> Google+ | <input type="checkbox"/> Pinterest | <input type="checkbox"/> SnapChat |
| <input type="checkbox"/> Altro (specificare) |                                  |                                    |                                   |

If you have chosen "other", please specify:

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

*Note: if you have NOT answered/chosen all of the following items: [3] in question 2, skip the following question*

**Q8: In particolare, quali funzionalità e quali informazioni relative al locale si possono trovare sui vostri account social network? (Possibili più risposte)**

- Chat
- Possibilità di prenotare online un tavolo
- Possibilità di ordinare online cibo da asporto
- Possibilità di recensire il locale
- Possibilità di contattare telefonicamente il locale
- Mappa interattiva su come raggiungere il locale
- Immagini e video del locale e dei piatti
- Collegamento al sito web del locale
- Creazione di eventi
- Collegamento agli altri account social network del locale
- Invio di promozioni lampo (voucher, coupon, ...) e inviti in tempo reale
- Presenza del Wi-Fi nel locale

- Presenza della TV per la visione di eventi sportivi  
 Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

*Note: if you have NOT answered/chosen all of the following items: [2] in question 4 OR answered/chosen all of the following items: [2] in question 6 OR answered/chosen at least one of the following items: [2] in question 8, skip the following question*

**Q9: Che tipo di sistema utilizzate per offrire la prenotazione di un tavolo sul vostro sito, app e/o profilo social network?**

- Sistema proprietario  
 Ci affidiamo a portali o app di prenotazione online di un tavolo (MiSiedo, MyTable, Quandoo, TheFork, ...)  
 Entrambi

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

*Note: if you have NOT answered/chosen all of the following items: [3] in question 4 OR answered/chosen all of the following items: [3] in question 6 OR answered/chosen all of the following items: [3] in question 8, skip the following question*

**Q10: Come gestite il servizio di asporto che fornite ai vostri clienti?**

- Il servizio è gestito internamente  
 Ci affidiamo ad aziende specializzate nel food delivery (Foodora, Just Eat, ...)  
 Entrambi

## SEZIONE 1 - Strumenti digitali utilizzati nella comunicazione

*Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3] in question 2, skip the following question*

**Q11: Quanto tempo dedicate ogni settimana ai vostri canali di comunicazione digitali (sito web, social network, ...) per attività legate al vostro locale?**

- Da 0 a 3 ore/settimana     Da 3 a 6 ore/settimana     Da 6 a 9 ore/settimana     Più di 9 ore/settimana

*Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3] in question 2, skip the following question*

**Q12: Ritenete che il tempo che dedicate ai vostri canali di comunicazione digitali (sito web, social network, ...) sia sufficiente per un utilizzo efficace?**

- Sì  
 No, ma non abbiamo a disposizione personale/tempo ulteriore  
 No, ma dedichiamo poco tempo perché la nostra clientela non è interessata ai canali digitali

## SEZIONE 2 - Strumenti digitali utilizzati nella prenotazione

**Q13: Posto a cento il numero di prenotazioni che ricevete, potreste indicare la loro provenienza? Nota: la somma delle percentuali deve fare 100% Nota: per chi non può fornire una risposta, inserire 100% nella casella “Non so rispondere”**

DIRETTAMENTE DAL CLIENTE FINALE		
a. Al telefono o al banco	<input type="text"/>	%
b. Tramite il nostro sito web	<input type="text"/>	%
c. Via e-mail	<input type="text"/>	%
d. Tramite la nostra applicazione per smartphone e/o tablet	<input type="text"/>	%
e. Tramite uno dei nostri profili sui social network (Facebook, Google +, ...)	<input type="text"/>	%
f. Tramite coupon o cofanetti regalo (Smartbox, Groupon, ...)	<input type="text"/>	%
TRAMITE SITI/APP DI PORTALI ESTERNI (TheFork, 2Spaghi, Just Eat, ...)	<input type="text"/>	%
TRAMITE SITI/PORTALI/APP DI PRENOTAZIONE DELLA DESTINAZIONE TURISTICA SVILUPPATI DA ENTI LOCALI O PRIVATI	<input type="text"/>	%

NON SO RISPONDERE	<input type="text"/>	%
ALTRO (specificare)	<input type="text"/>	%
<input type="text"/>		
	_____	
TOTALE PRENOTAZIONI RICEVUTE	100	%

## SEZIONE 2 - Strumenti digitali utilizzati nella prenotazione

**Q14: Oltre al contante, quali sistemi di pagamento accettate? (Possibili più risposte)**

- |  |  |                                  |
|--|--|----------------------------------|
| <input type="checkbox"/> Bancomat            | <input type="checkbox"/> Carte di credito          | <input type="checkbox"/> Assegni |
| <input type="checkbox"/> Buoni pasto         | <input type="checkbox"/> Mobile POS con Smartphone | <input type="checkbox"/> Nessuno |
| <input type="checkbox"/> Altro (specificare) |  |                                  |

If you have chosen "other", please specify:

## SEZIONE 2 - Strumenti digitali utilizzati nella prenotazione

*Note: if you have NOT answered/chosen all of the following items: [4] in question 14, skip the following question*

**Q15: In particolare, quale formato di buoni pasto accettate nel vostro locale?**

- |  |   |
|--|---|
| <input type="radio"/> Formato cartaceo                     | <input type="radio"/> Formato elettronico |
| <input type="radio"/> Sia formato cartaceo che elettronico |   |

## SEZIONE 2 - Strumenti digitali utilizzati nella prenotazione

**Q16: Pensate che i portali/le app di prenotazione di ristoranti come TheFork, MiSiedo, rappresentino più un problema o un'opportunità per il vostro locale?**

- Un problema       Un'opportunità       Nessuno dei due       Non saprei  
 Non so cosa siano

## SEZIONE 2 - Strumenti digitali utilizzati nella prenotazione

**Q17: Pensate che i portali/le app di food delivery come Just Eat, Foodora, rappresentino più un problema o un'opportunità per il vostro locale?**

- Un problema       Un'opportunità       Nessuno dei due       Non saprei  
 Non so cosa siano

## SEZIONE 3 - Altri strumenti digitali

**Q18: Quali di queste attività svolgete per raccogliere riscontri, opinioni e commenti dai clienti? (Possibili più risposte)**

- Leggiamo le recensioni su di noi su alcuni siti (TripAdvisor, ...)
- Spingiamo i nostri clienti a pubblicare le loro recensioni su portali dedicati
- Cerchiamo commenti e opinioni su di noi su blog e community online di settore
- Abbiamo una sezione dedicata nel nostro sito web
- Abbiamo un profilo su un social network (Facebook o Twitter) che usiamo anche per la raccolta di commenti, lamentele e suggerimenti
- Non svolgiamo alcuna attività per raccogliere riscontri, opinioni e commenti
- Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 3 - Altri strumenti digitali

Note: if you have NOT answered/chosen at least one of the following items: [1, 2, 3, 4, 5, 7] in question 18, skip the following question

**Q19: Con che frequenza rispondete alle recensioni su di voi?**

	Sempre o quasi sempre	Spesso	Soltanto in alcuni casi	Quasi mai	Mai
Rispondiamo alle recensioni positive					
Rispondiamo alle recensioni negative					

**SEZIONE 3 - Altri strumenti digitali**

**Q20: Pensate che i portali di recensione come TripAdvisor rappresentino più un problema o un'opportunità per il vostro locale?**

- Un problema       Un'opportunità       Nessuno dei due       Non saprei  
 Non so cosa siano

**SEZIONE 3 - Altri strumenti digitali**

Note: if you have NOT answered/chosen item [1] in question 20, skip the following question

**Q21: Quali sono i motivi principali per cui i portali di recensione come TripAdvisor rappresentano un problema per il vostro locale? (Massimo 3 risposte)**

- L'assenza di controlli sulle recensioni può causare concorrenza sleale (ad esempio è possibile acquistare sul mercato pacchetti di recensioni positive per incrementare la propria reputazione)
- L'assenza di controlli sulle recensioni può danneggiare la reputazione del locale (ad esempio sono frequenti le "minacce" dei clienti di recensioni negative in cambio di sconti o benefici)
- È difficile convincere i clienti a recensire il locale
- È impossibile stabilire se un cliente ha frequentato effettivamente il locale
- Il processo di risposta alle recensioni è lungo e complicato
- Altro (specificare)

If you have chosen "other", please specify:

**SEZIONE 3 - Altri strumenti digitali**

**Q22: Usate all'interno del vostro locale qualcuno dei seguenti strumenti digitali per la gestione di processi interni (allineamento della comanda, gestione del magazzino, gestione delle prenotazioni, ...)? (Possibili più risposte)**

- Sistemi di indoor positioning (Beacon, ...) per attrarre i clienti nel locale quando si trovano nelle vicinanze dello stesso
- App/software, su tablet o palmare e/o altro, per prendere e allineare la comanda (WinWork Rist, Comanda Facile Restaurant, ...)
- Chioschi, totem o touch point digitali da cui il cliente può effettuare ordini
- Software, su pc o tablet, per monitorare le prestazioni della sala (EasyPOS, ...)
- Software, su pc o tablet, per la gestione del magazzino (Menu di Passepartout, ...)
- Tecniche e analisi per la creazione del menù (secondo i principi del menù engineering\*)
- Software gestionali per la gestione degli acquisti, dei fornitori, dei tavoli in sala e del personale (Zmenu, Ristojet, ...)
- Software per la gestione delle prenotazioni che vengono effettuate sul sito (TheFork Manager, Ordinalo, ...)
- App su Tablet per ordinare i menù in sala e pagare direttamente al tavolo (WineAmore, ...)
- Software di CRM (Customer Relationship Management) per la gestione dei rapporti con i clienti (promozioni, email di aggiornamento, raccogliere dati del cliente, ...)
- Soluzioni per la fatturazione elettronica e dematerializzazione
- Non usiamo strumenti digitali per la gestione dei processi interni
- Altro (specificare)

If you have chosen "other", please specify:

*\*Scienza che studia come massimizzare i profitti di un ristorante utilizzando il design del menù e il posizionamento degli oggetti sul menù stesso*

## **SEZIONE 4 - Servizi al cliente in loco**

**Q23: Offrite ai vostri clienti contenuti satellitari della Pay TV sulla televisione?**

- Sì  No

**Q24: Offrite ai vostri clienti contenuti satellitari della Pay TV fruibili anche direttamente sul loro device (pc/tablet/smartphone), oltre che sulla televisione?**

- Sì  No

## SEZIONE 4: Servizi al cliente in loco

Note: if you have NOT answered/chosen item [1] in question 23 OR answered/chosen item [1] in question 24, skip the following question

**Q25: Con quale operatore offrite il servizio di Pay TV?**

- Sky                                      Mediaset Premium                                      Vodafone                                      Infostrada  
 Tim    Fastweb    Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 4: Servizi al cliente in loco

**Q26: &Egrave; presente una connessione internet Wi-Fi nel vostro locale?**

- Si     No

## SEZIONE 4: Servizi al cliente in loco

Note: if you have NOT answered/chosen item [1] in question 26, skip the following question

**Q27: Qual è il fornitore Internet per il vostro locale?**

- Ehiweb                                      Fastweb                                      Fiberling                                      Infostrada  
 Siportal                                       Tiscali                                       Tim                                       Tooway  
 Vodafone                                       Altro (specificare)

If you have chosen "other", please specify:

## SEZIONE 4: Servizi al cliente in loco

Note: if you have NOT answered/chosen item [1] in question 26, skip the following question

**Q28: Quali sono i commenti che ricevete più spesso sul servizio Wi-Fi? (Possibili più risposte)**

- Il servizio è lento                                       Si perde facilmente la connessione  
 È' complicato l'accesso/la registrazione                                       La connessione non è potente  
 Il servizio è di buon livello                                       Di solito non ricevo commenti sul servizio

## SEZIONE 5: Informazioni generali

*Il questionario sta per concludersi, vi chiediamo di compilare poche ultime domande sulla tipologia di locale e sul vostro ruolo.*

**Q29: Qual è il suo ruolo all'interno del locale?**

- |   |  |   |
|---|--|---|
| <input type="radio"/> Titolare/socio del locale | <input type="radio"/> Direttore del locale | <input type="radio"/> Food and beverage manager |
| <input type="radio"/> Maitre                    | <input type="radio"/> Impiegato            | <input type="radio"/> Altro (specificare)       |

If you have chosen "other", please specify:

## SEZIONE 5: Informazioni generali

**Q30: Che tipo di locale siete?**

- |   |   |
|---|---|
| <input type="radio"/> Bar/pub   | <input type="radio"/> Ristorante con servizio |
| <input type="radio"/> Pizzeria con servizio                             | <input type="radio"/> Agriturismo             |
| <input type="radio"/> Ristorante take away (paninoteca, fast food, ...) | <input type="radio"/> Altro (specificare)     |

If you have chosen "other", please specify:

## SEZIONE 5: Informazioni generali

**Q31: Il locale è a gestione familiare?**

- Sì  No

**Q32: Quanti addetti conta il vostro locale?**

## SEZIONE 5: Informazioni generali

Note: if you have NOT answered/chosen item [2, 3, 4, 5, 6] in question 30, skip the following question

**Q33: Indicare approssimativamente il numero massimo di coperti che il vostro locale è in grado di offrire**

- < 30     30 – 50     51 - 75     76 - 100     100 - 200     > 200

### SEZIONE 5: Informazioni generali

**Q34: Il vostro locale è:**

- Indipendente, non affiliato ad alcun gruppo     Parte di un gruppo

**Q35: Il vostro locale è:**

- Convenzionato ad una struttura ricettiva     All'interno di una struttura ricettiva  
 Non associato ad alcuna struttura ricettiva     Altro (specificare)

If you have chosen "other", please specify:

### SEZIONE 5: Informazioni generali

Note: if you have NOT answered/chosen item [2] in question 34, skip the following question

**Q36: In particolare, di quale gruppo fate parte?**

- |  |                                     |   |  |
|--|-------------------------------------|---|--|
| <input type="radio"/> McDonald's         | <input type="radio"/> Rossopomodoro | <input type="radio"/> Rana ristoranti     | <input type="radio"/> Roadhouse            |
| <input type="radio"/> Old wild west      | <input type="radio"/> Panino giusto | <input type="radio"/> Eataly              | <input type="radio"/> Spontini             |
| <input type="radio"/> Fratelli la Bufala | <input type="radio"/> MyChef        | <input type="radio"/> California Bakery   | <input type="radio"/> La bottega del caffè |
| <input type="radio"/> 100 montaditos     | <input type="radio"/> Chef express  | <input type="radio"/> Tavolamica          | <input type="radio"/> Gustami              |
| <input type="radio"/> Camst café         | <input type="radio"/> Oltremodo     | <input type="radio"/> Altro (specificare) |  |

If you have chosen "other", please specify:

### SEZIONE 5: Informazioni generali

**Q37: Con riferimento allo scontrino medio, a quale fascia di prezzo appartiene il vostro locale?**

- < 20€     20€ - 30€     31€ - 50€     51€ - 75€     76€ - 100€     >100€

## SEZIONE 5: Informazioni generali

**Q38: Posto a cento il numero di clienti che servite mediamente in un anno, come si ripartisce la clientela tra le seguenti categorie? Nota: la somma delle percentuali deve fare 100%**

Residenti		%
Clientela Business		%
Turisti		%
_____		
CLIENTELA COMPLESSIVA	100	%

## SEZIONE 5: Informazioni generali

**Q39: Fatturato del locale espresso in euro per l'anno 2016. Indicare la fascia di appartenenza Nota: si intende il valore totale del giro d'affari (comprensivo del valore dei coperti venduti e delle fee di intermediazione)**

- |   |   |   |
|---|---|---|
| <input type="radio"/> 0 - 50.000€         | <input type="radio"/> 50.001€ - 100.000€    | <input type="radio"/> 100.001€ - 200.000€     |
| <input type="radio"/> 200.001€ - 350.000€ | <input type="radio"/> 350.001€ - 500.000€   | <input type="radio"/> 500.001€ - 650.000€     |
| <input type="radio"/> 650.001€ - 800.000€ | <input type="radio"/> 800.001€ - 1.000.000€ | <input type="radio"/> 1.000.001€ - 2.000.000€ |
| <input type="radio"/> Oltre 2.000.000€    |   |   |

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