A Websites Analysis of European Tourism Organizations

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Abstract

Internet has proved to be a widespread medium and an integral part of the habits of millions of users. An effective online communication strategy is considered nowadays a key element to achieve a competitive advantage on the market, to satisfy actual and potential tourists' information needs in a highly competitive way and to acquire new clients.

All the European countries have implemented some kind of official tourism portal to promote their own destinations.

An analysis of these tourism websites has been performed collecting end-user evaluations and mapping contents and services offered online. The results of this survey are presented and are compared with the general behaviour of the European Internet users regarding the usage of the network as a tool to gather information and to acquire travel services.

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After having performed research and teaching activities in astrophysics and radioastronomy, he has been involved with the computer industry for more than 20 years, working in several large companies and specializing in planning and development of information systems, technology management and managerial education.

He is now a consultant and lecturer at the Bocconi University (Milan) where he teaches a course in Computer Science and coordinates the Information and Communication Technologies area at the Master in Tourism and Economics.

His current research interest centers on the uses of information and communication technologies in the tourism field with a special focus on web engineering, design and content authoring and web metrics.

He is one of the founding members of Società Internet, Italian chapter of the Internet Society, and member of the Italian Physics Society.
Introduction

Internet has become, in hardly more than thirty years, the most significant development in communications since the invention of the printing press and has revolutionised deeply the way in which we communicate.

The number of users connecting to the Internet worldwide is estimated in more than 600 million and it is still growing (NUA, 2002). Moreover, it has been the fastest growing communications medium ever and the great part of this diffusion is due to the development of the World Wide Web; its rate of diffusion has been much faster than radio in the 20's, television in the 50's and mobile phones in the 80's (Odlyzko, 2000).

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

Internet provides features that are especially relevant to the marketing of tourism.

Travel is a an experiential practice; travellers are not simply buying packages, stays, seats, or food and beverages, they are fulfilling fantasies (Archdale, 1995). The Internet, with its wealth of information, pictures and multimedia has the capability to provide the appropriate stimuli to favour the purchase of a travel product or service.

Recent demographic data show that the top 15 tourism spending countries (WTO, 2001) also exhibit (with the exception of China) the highest percentages of Internet users among the population (Table 1).

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Internet users (% of popul.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United States</td>
<td>59.10</td>
</tr>
<tr>
<td>2</td>
<td>Germany</td>
<td>38.91</td>
</tr>
<tr>
<td>3</td>
<td>United Kingdom</td>
<td>57.24</td>
</tr>
<tr>
<td>4</td>
<td>Japan</td>
<td>44.10</td>
</tr>
<tr>
<td>5</td>
<td>France</td>
<td>28.39</td>
</tr>
<tr>
<td>6</td>
<td>Italy</td>
<td>33.37</td>
</tr>
<tr>
<td>7</td>
<td>China</td>
<td>3.58</td>
</tr>
<tr>
<td>8</td>
<td>Netherlands</td>
<td>60.83</td>
</tr>
<tr>
<td>9</td>
<td>Canada</td>
<td>52.79</td>
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</table>
Furthermore, it is well known that the tourism subjects are at the first places in the interests of world's cybernauts: just to give an example almost 47% of European Internet users browse the Web while planning a trip and almost 23% of them actually buy tourist products online (ETC, 2002).

This wide utilization of the Internet for travel related purposes is confirmed by the revenues of e-commerce in this area. In Europe online travel sales have risen from 4.8 billion Euro in 2001 (2.3% of the total tourism market) to 6.9 billion Euro in 2002 (3.2% of the market, a 42% increase), and the growth is given to continue with forecasts between 15 and 20 billion Euro for the year 2006 (Marcussen, 2002).

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

### Successful Internet websites: evaluation methodology

The Internet and the Web are still too young to be thoroughly understood phenomena, but, as such, they are much studied. A great number of researches, surveys and investigations have been performed in the last years. Many of these deal with the behaviour of a cybernaut and on the features required to attain a good level of success in the promotional and marketing activities in the cyberspace (Barwise et al., 2002).

Summarizing the ideas and the studies from a number of practitioners and researchers it is possible to compile a list of elements that are essential to the development of a successful website. This sort of decalogue may be expressed as follows:

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</table>

Table 1 Top tourism spending countries and Internet users data

<table>
<thead>
<tr>
<th></th>
<th>Belgium/Luxembourg</th>
<th>36.62</th>
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<tbody>
<tr>
<td>10</td>
<td>Austria</td>
<td>45.20</td>
</tr>
<tr>
<td>11</td>
<td>Republic of Korea</td>
<td>53.80</td>
</tr>
<tr>
<td>12</td>
<td>Sweden</td>
<td>67.81</td>
</tr>
<tr>
<td>13</td>
<td>Switzerland</td>
<td>52.70</td>
</tr>
<tr>
<td>14</td>
<td>Taiwan</td>
<td>51.85</td>
</tr>
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<td>15</td>
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</table>
1. Strategies and objectives must be clearly stated and clearly understandable by the visitors.

2. Target audience must be identified and the site must meet the needs expressed by it.

3. Features that make possible an interaction between the user and the organisation must be present and designed in a fully usable way.

4. Rational structure supported by navigation aids must avoid any risk of confusion and allow users to browse all of the sections with great ease.

5. Other features adding functionality or aesthetic appeal must be designed in a coherent way and must be functional to the site contents.

6. Informational content must be presented in a readable and correct way (colors, size, fonts, grammar, style, etc.). The site must exhibit credibility, relevance and accuracy of the information presented.

7. Content of high value must be provided to the users to encourage them to explore further and to return regularly to the site.

8. Regular and frequent maintenance to add, revise or remove content and to correct errors and malfunctions must be accomplished.

9. Promotion of the site must take place using an integrated approach that incorporates traditional media and online resources.

10. Financial, human and physical resources required for the Internet marketing effort must be given the correct consideration and planned and controlled in a reasonable way.

Starting from these principles it is possible to define a list of characteristics than can be evaluated by a sample of users of a specific implementation.

The websites of the major European and a number of Mediterranean tourism destinations have been assessed using a methodology derived from these considerations.

A representative sample of end-users have compiled a questionnaire evaluating a number of features grouped in six main categories:

1. *first impact (FI)*: the general feeling during a first scan, before an accurate visit of the site;
2. **design and graphics (DG):** the quality of graphical elements (pictures, symbols, photographs, etc.) and the balance between texts and images;

3. **information contents (IC):** the thoroughness and usefulness of information, the clarity of language;

4. **interactivity and services (IS):** the number and the quality of the interactive services and the tested user-friendliness of the functions;

5. **structure and navigation (SN):** the rationality of website structure and navigation aids;

6. **technical management (TM):** the updating of the contents, the response times and the absence of errors or missing links.

The evaluation is qualitative, visitors express their appreciation of various website usability features by means of a score (Baggio and Covini, 2001; Antonioli and Baggio, 2002). Evaluators have been asked to award a score from 0 (minimum) to 3 (maximum) to each item of the list.

Moreover, a mapping of the contents and services offered on the websites has been performed.

The analysis has been accomplished by identifying a series of possible informational contents and interactive services that are considered useful or appealing for a user of a tourist website (see for example: Rachman and Buchanan, 1999).

The items list, comprising elements such as accurate geographical information, itinerary descriptions, interactive request forms, e-business functionalities, etc., is structured in four main groups:

- **informational contents (IN):** information and documentation contents;

- **customer relationship (CR):** contents and services that make relationships with clients and visitors easier and stronger;

- **interactive services (SV):** general interactive functions and services;

- **e-commerce (EB):** commercial and e-business functions.

The evaluators are asked to check the existence of the items on the website under analysis and to assign a score (from 0 = min to 3 = max) taking into account the usability and the completeness of the single functionalities.
The websites surveyed are listed in Table 2.

<table>
<thead>
<tr>
<th>Country</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td><a href="http://www.austria-tourism.at">www.austria-tourism.at</a></td>
</tr>
<tr>
<td>Croatia</td>
<td><a href="http://www.croatia.hr">www.croatia.hr</a></td>
</tr>
<tr>
<td>Egypt</td>
<td><a href="http://www.touregypt.net">www.touregypt.net</a></td>
</tr>
<tr>
<td>England</td>
<td><a href="http://www.visitbritain.com">www.visitbritain.com</a></td>
</tr>
<tr>
<td>France</td>
<td><a href="http://www.franceguide.com">www.franceguide.com</a></td>
</tr>
<tr>
<td>Germany</td>
<td><a href="http://www.germany-tourism.de">www.germany-tourism.de</a></td>
</tr>
<tr>
<td>Greece</td>
<td><a href="http://www.gnto.gr">www.gnto.gr</a></td>
</tr>
<tr>
<td>Italy</td>
<td><a href="http://www.enit.it">www.enit.it</a></td>
</tr>
<tr>
<td>Morocco</td>
<td><a href="http://www.tourism-in-morocco.com">www.tourism-in-morocco.com</a></td>
</tr>
<tr>
<td>Portugal</td>
<td><a href="http://www.portugal.org">www.portugal.org</a></td>
</tr>
<tr>
<td>Scandinavia</td>
<td><a href="http://www.goscandinavia.com">www.goscandinavia.com</a></td>
</tr>
<tr>
<td>Slovenia</td>
<td><a href="http://www.slovenia-tourism.si">www.slovenia-tourism.si</a></td>
</tr>
<tr>
<td>Spain</td>
<td><a href="http://www.tourspain.es">www.tourspain.es</a></td>
</tr>
<tr>
<td>Switzerland</td>
<td><a href="http://www.switzerlandtourism.ch">www.switzerlandtourism.ch</a></td>
</tr>
<tr>
<td>Tunisia</td>
<td><a href="http://www.tourismtunisia.com">www.tourismtunisia.com</a></td>
</tr>
<tr>
<td>Turkey</td>
<td><a href="http://www.turizm.gov.tr">www.turizm.gov.tr</a></td>
</tr>
</tbody>
</table>

Table 2 Websites analysed

The sample comprises the official tourism websites of the European countries and a number of websites belonging to Mediterranean countries that have a strong influence on international tourism.

**European tourism websites analysis results**

The results of the general evaluation for the websites listed in Table 2 is shown in Figure 1.

![Figure 1 General evaluation of European websites](image)

(abbreviations for the items groups are given in the preceding paragraph)
The general average score attained is depicted in Figure 2.

![Figure 2 General average evaluation](image)

On the scale used (0 to 3) the 1.5 mark means an average sufficiency verdict. As can be seen clearly, only few websites reach this score. Looking at the distribution of the evaluations in the different groups (Figure 1) it can be noticed that the highest scores are generally achieved by what may be called *aesthetic features*: first impact, design and graphics (both strongly related) and structure and navigation. This fact is better shown in Figure 3, where the general average evaluations of the six features groups are accounted for.

![Figure 3 Average evaluations for the features groups](image)

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

A confirmation of this fact comes from the analysis of the contents and services offered online by the websites studied.

Figure 4 and Figure 5 give the percentage of features (contents and services) present in the websites with respect to the general list of items discussed in the previous paragraph.

With only few exceptions, most of them offer less than 50% of the contents expected.

Figure 4 Contents coverage of European tourist websites
Averaging the results (Figure 6) attained by the items groups, it can be seen a sufficient presence of informational documentation features expected (67%) but a very low incidence of interactive services (47%) an even lower occurrence of customer relationship features (40%) and an almost non-existent (17%) set of functionalities able to develop an e-business environment with other public or private partners.

Again, this confirms the previous perception of an "advertising" rather than "interactive service" attitude of the main national tourism organizations towards the customers, actual or potential.

Combining the users evaluation and the contents average coverage it is possible to derive a general quality index defined as:

\[
\text{QUALITY INDEX} = \text{AVERAGE EVALUATION} \times \text{CONTENTS COVERAGE}
\]
The quality indexes calculated for the websites under analysis is depicted in Figure 7.

![Figure 7 European tourism websites quality index](image)

**Website quality impact on tourism**

Influence of website quality on brand building and loyalty has been assessed in a number of empirical and theoretical works (Holland and Menzel Baker, 2001; Barwise et al., 2002; Ilfeld and Winer, 2002), and many stress the critical role of the first impression created by a website as well as its ease of use (Smith, 2000).

A website is one of the primary faces of an organization towards its customers, suppliers, employees, and partners and it can be a powerful tool for brand awareness, product information, commerce and customer service. These considerations should have been well understood by the national tourism organizations.
Figure 8 maps the rank as international tourist destination (WTO, 2002) and the Quality Index of the national tourism websites.

With an ever growing proportion$^1$ of Internet users seeking tourist information on the Net, high-rank destinations with "bad" websites face the risk of losing valuable customers such as those from the wealthy origins that are also intensive Internet users (see Table 1).

For a destination marketing organization, the low users evaluation and the relative poverty in terms of contents and services may have serious effects on the development of the whole destination and may generate a general distrust that can eventually affect also the economic performance of the "real world" (see, for example, Gaudin, 2002).

The online market for travels and packages has been growing in the last years at a very high speed, but with different pace in the European countries. A survey by the European Travel Commission (ETC, 2002) gives the proportion of users that look for tourism information on the Internet and the proportion of users that actually buy a tourist product.

The ratio buyers/lookers is a good index of the effectiveness of the online tourism implementations and of the growth potential of this important market.

Table 3 and Figure 9 show these results.

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$^1$ For example, a survey by Yesawich, Pepperdine & Brown/Yankelovich Partners (Carton, 2002) shows that 90% of Americans who have access to the Internet search information on tourism websites and almost 66% prefer a website to a travel agent.
<table>
<thead>
<tr>
<th></th>
<th>QI</th>
<th>Buyers/Lookers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switzerland</td>
<td>1.45</td>
<td>0.44</td>
</tr>
<tr>
<td>England</td>
<td>1.25</td>
<td>0.84</td>
</tr>
<tr>
<td>Austria</td>
<td>0.94</td>
<td>0.31</td>
</tr>
<tr>
<td>Spain</td>
<td>0.84</td>
<td>0.26</td>
</tr>
<tr>
<td>France</td>
<td>0.58</td>
<td>0.69</td>
</tr>
<tr>
<td>Italy</td>
<td>0.49</td>
<td>0.08</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>0.47</td>
<td>0.26</td>
</tr>
<tr>
<td>Germany</td>
<td>0.45</td>
<td>0.39</td>
</tr>
</tbody>
</table>

Table 3 Buyers/lookers ratio and Quality Indexes

Figure 9 Buyers/lookers ratio and Quality Indexes

Even if it is not possible to maintain that there is a strict relationship\(^2\) between the two variables, it is rather clear that a positive correlation exists.

This fact leads to the consideration that, give the huge amount of money involved in the ecommerce activities, countries showing poor quality may be losing commercial opportunities for their companies.

**Conclusions**

European countries are the most popular tourist destination in the world and the promotion of their resources is a crucial activity, mainly performed by the various national tourism organizations.

\(^2\) A linear regression gives a \( R^2 \approx 0.2 \), which cannot be considered statistically significant.
Internet and the Web have proved, in the last years, to be a widespread communication and business environment and have rapidly become important part of the habits of millions of users. An effective online communication strategy is considered nowadays a key element to achieve a competitive advantage on the market, to satisfy actual and potential tourists' information needs in a highly competitive way and to acquire new clients.

All the European countries have implemented some kind of official Internet tourism portal to promote their own destinations.

An analysis of these tourism websites has been performed collecting end-user evaluations and mapping contents and services offered online.

The results of this survey show that, even considering the relative young age of these implementations, the websites presently fail to keep most of the promises. While the potential of the Internet has been much showed off, most of the websites do not meet their potential.

Users evaluations and mapping of contents and services offered attain a generally low quality index, mainly in the area of the customer relationship functionalities.

Organizations may be handing over to close competitors significant parts of their market share because their websites deliver a poor quality of experience to their users.

More, given the relationship between online buyers and website quality, some of the countries do not take full advantage of the ecommerce capabilities of the Internet thus risking to lose significant business for the companies involved.

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NUA (2002), *How many online*, Nua (http://www.nua.com/surveys/how_many_online/ [last access: January 2003].


