Attractiveness and Competitiveness of Sicilian Tourism Districts

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Outline

- ✓ Attractiveness and Competitiveness of tourism destinations: an overview

- ✓ Four surveys in Sicily: Regional Project FESR 2007-2013

- ✓ Main aims and the research design

- ✓ Main results

- ✓ Comments and conclusion

Attractiveness and competitiveness of tourist destinations

- ✓ Destination attractiveness as a function of the resource base (attractions) and of demand (those who are attracted)
  - ✓ An analytical technique to measure attractiveness should combine the evaluation of existing resources and their perceived attractiveness (Formica, Uysal, 2006)
- ✓ Several perspectives in defining and measuring destinations' competitiveness
  - ✓ Price levels (Dwyer, Forsyth, Rao, 2000, 2001)
  - ✓ Five levels of comparative and competitive advantages (Crouch, Ritchie, 1994, 1995, 1999; Ritchie, Crouch, 1993, 2000, 2003)
  - ✓ Hedonic price theory (Mangion, Durbarry, Sinclair, 2005)
  - ✓ Competitiveness Monitor (WTTC; Mazanec, Wöber, Zins, 2007)
  - ✓ ...

Concepts and issues in measurement

- ✓ The "holistic approach" stresses the importance of considering the tourism destination as a whole (Haughland et al., 2011; Volo, Notarstefano, 2012)
  - ✓ Complex system of relationship among agents and determinants of tourism destination attractiveness and competitiveness
- ✓ Problems for measurement at a local level due to unavailability/inadequacy of data
  - ✓ Lack of adequate territorial/timing detail
  - ✓ Lack of harmonization of different sources of data
  - ✓ Unobserved tourism
  - ✓ Multi-destination trip
 - ✓ …

Sicilian tourism districts

✓ Recently instituted by the Regional government according to the Italian law on tourism development, with the aim of

- ✓ Fostering cooperation among firms involved in the tourism sector
- ✓ Promoting marketing actions
- ✓ Promoting the development of brands of quality
- ✓ Promoting the accommodation sector and infrastructure development
- ✓ Creating info-points for tourists
- ✓ …

✓ They can be constituted by both public and private institutions

✓ In June 2012 n=16 territorial tourism districts and n=9 thematic tourism districts were instituted (only 12% of municipalities do not belong to any tourism district)

Territorial districts
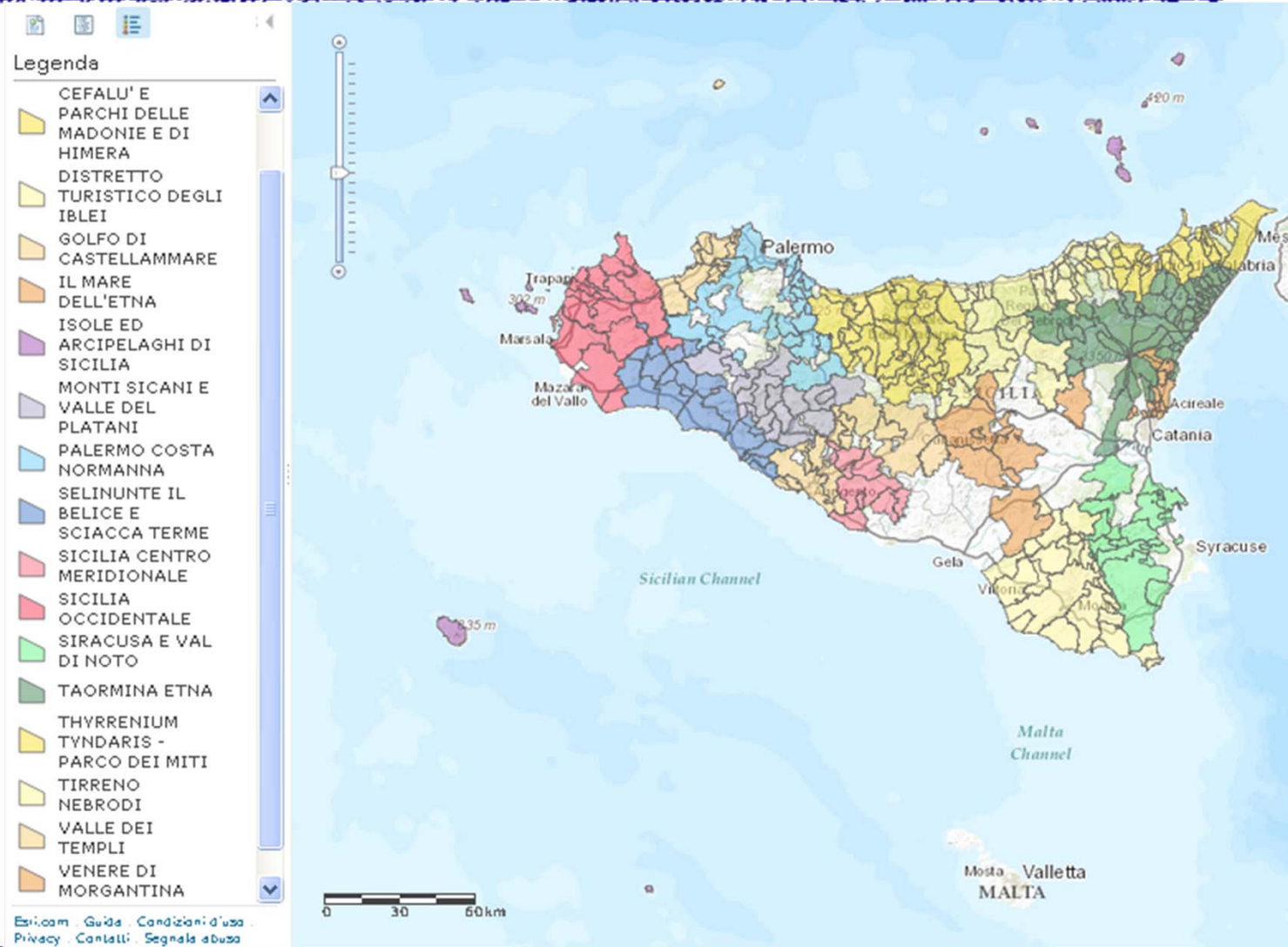
Thematic districts
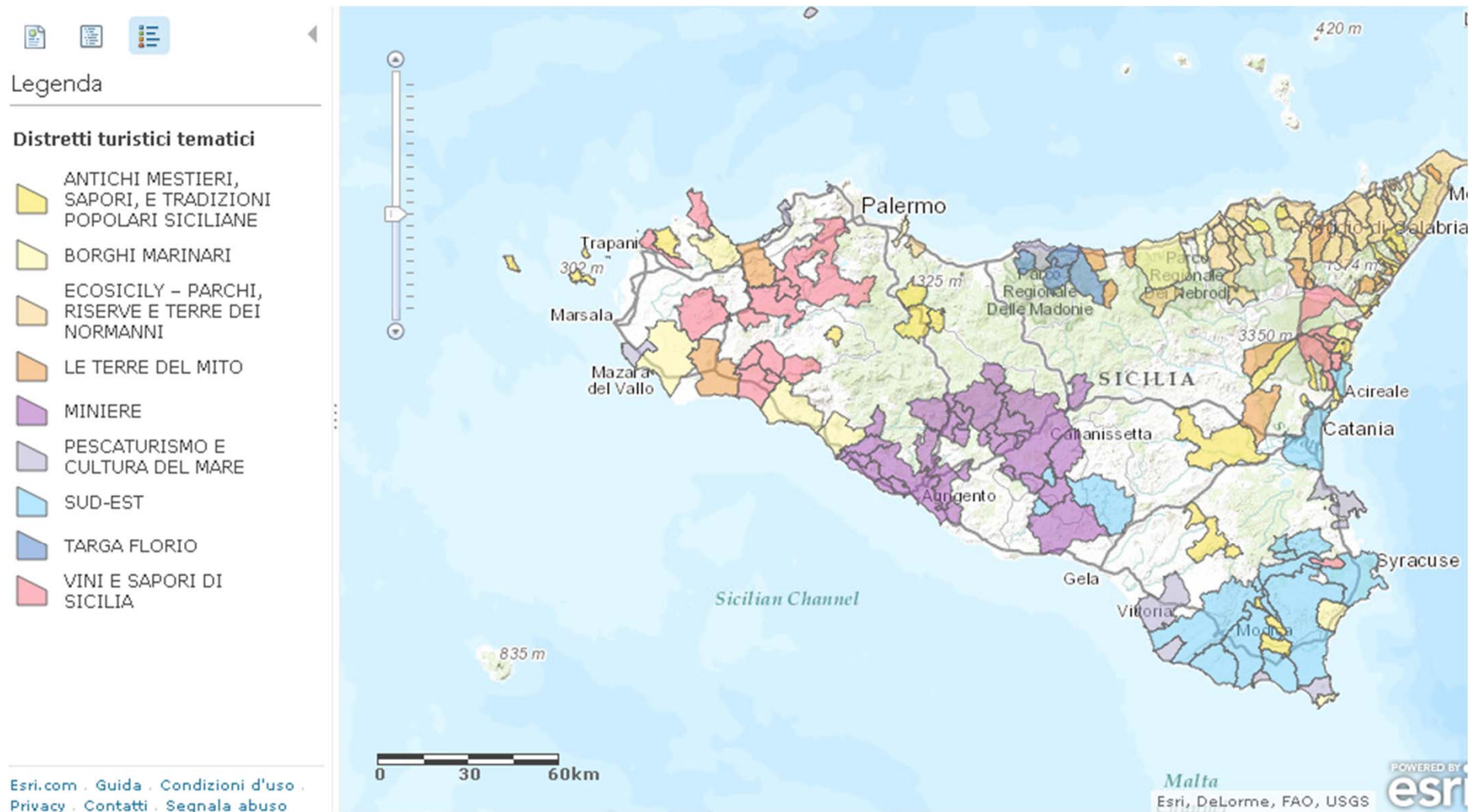
Research on attractiveness and competitiveness in Sicilian tourism districts: main goals

✓ To implement an integrated approach for measuring attractiveness and competitiveness of Sicilian tourism districts

  ✓ Tourism resources

  ✓ Experts' assessment

  ✓ Firms' characteristics (as a agents for local tourism development)

  ✓ Tourists' perceptions and behaviors

  ✓ Residents' perceptions

Statistical units and key-measures of attractiveness and competitiveness

✓ **Supply side**

   ✓ Resources' inventory

   ✓ Domestic end foreign stakeholders' opinions on the importance and availability of the attractiveness resources

   ✓ Managers' of the tourism industry opinions

   ✓ Residents' attitudes towards tourists and tourism

✓ **Demand side**

   ✓ Incoming tourists' opinions and behaviors

   ✓ Domestic tourists' (residential tourism) opinions and behaviors

Surveys on attractiveness and competitiveness: main features (1)

- ✓ Four surveys, and a desk-one carried out in order to build the inventory of resources, were implemented:
  - ✓ Survey period: spring 2012-winter 2013.
  - ✓ Information related to Sicily as a whole and to the Sicilian tourism districts: territorial (n=16) and thematic (n=9).
  - ✓ A territorial district can partially overlap with a thematic district
- ✓ Survey concerning stakeholders
  - ✓ Semi-structured interviews to foreign intermediaries of the touristic demand (n=75) and to policy makers and domestic representatives of the Sicilian districts (n=40).

Surveys on attractiveness and competitiveness: main features (2)

- ✓ Survey on residents
  - ✓ Implemented through a two stage probabilistic sampling scheme, according to the level of tourism activity in each municipality and to their demographic weight
  - ✓ Aimed at interviewing respondents as dwellers and as domestic tourists
  - ✓ Two waves of interviews (by CATI and CAWI techniques)
  - ✓ 2795 interviews were collected.
  - ✓ Some municipalities belong to two tourism districts, 4117 valid interviews (at least 140 valid cases for each district).

Surveys on attractiveness and competitiveness: main features (3)

- ✓ **Survey to incoming tourists**
  - ✓ Realized through time location sampling scheme (De Cantis et al.2010; De Cantis, Ferrante, 2012).
  - ✓ CAPI at the end of their trip before leaving the Island.
  - ✓ Four weeks of interviews (one for each season) between spring 2012 and winter 2013.
  - ✓ 3220 valid interviews
- ✓ **Survey directed to the managers of hospitality and tourism industry.**
  - ✓ Aimed at obtaining information about some aspects of the working system of the local hospitality and tourism industry.
  - ✓ Probabilistic stratified sampling, strata putting together industries belonging to the same activity sector (hospitality, other tourism industry) in each tourism district.
  - ✓ The sampling dimension was fixed to 800.

Attractiveness and competitiveness: Main indicators

✓ Composite indicators

    ✓ Inventory Attractiveness Indicator

Share of "potentially attractive" resources for which data are available: natural, cultural

    ✓ Stakeholders Attractiveness Indicator

Opinion on resources' availability * Weight of the importance for each of the eight dimensions of attractiveness (as identified by Ritchie and Zins, 1978)

    ✓ Tourism Quality of Life Indicator (Andereck e Nyaupane, 2011)

Satisfaction*Importance*Perceived effect of tourism

    ✓ Tourist Behaviour Indicator

Share of arrivals *Satisfaction* Willingness to recommend the destination to relatives and friends

    ✓ Networking Tourism Industry Indicator

Dynamic communication system adopted
Level of relationship with other industries and with institutions

Preliminary results

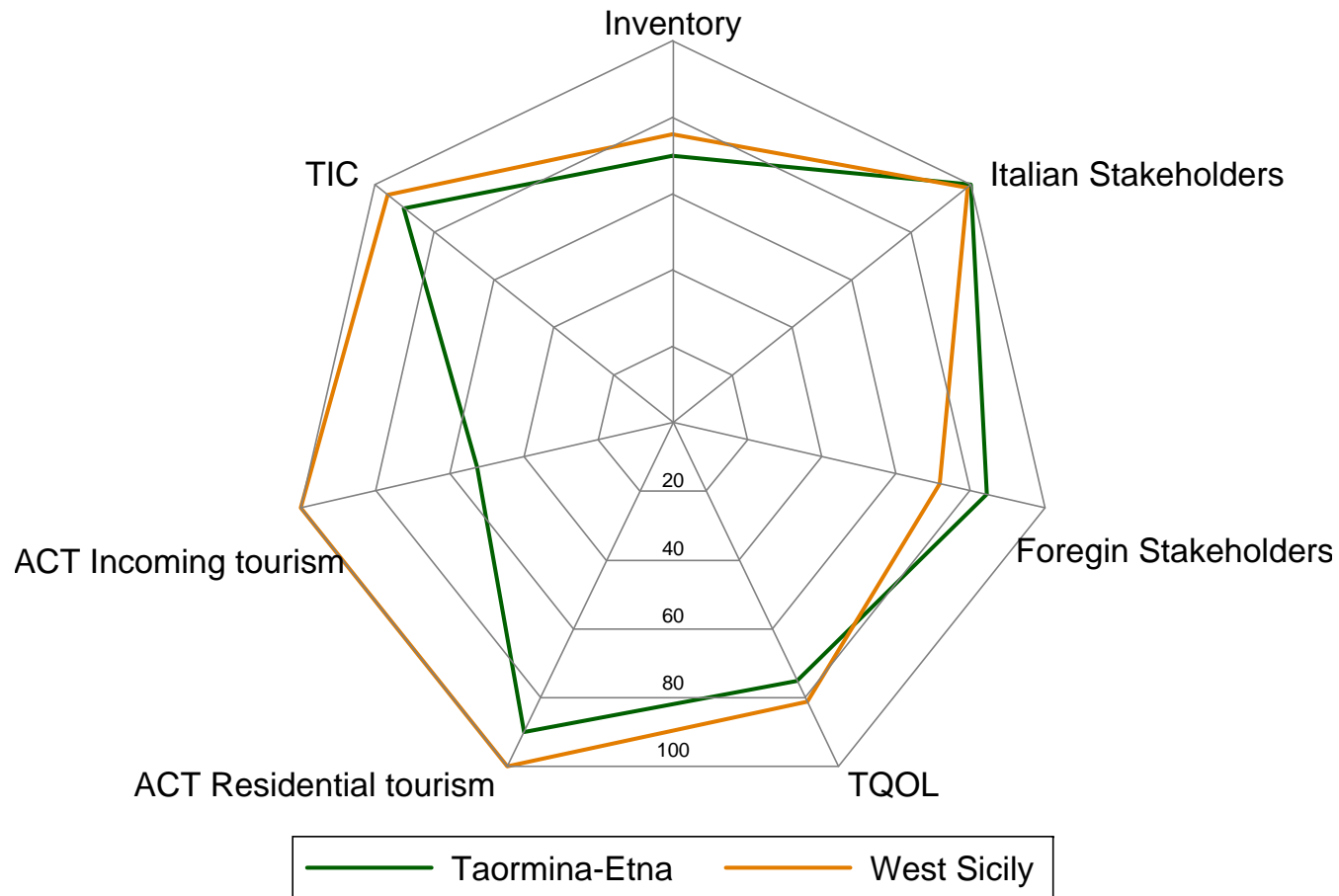| TERRITORIAL DISTRICT	Inventory	Italian Stakeholders	Foreign Stakeholders	TQOL	ACT Residential tourism	ACT Incoming tourism	TIC
CEFALU' E PARCHI DELLE MADONIE E HIMERA	63.61	94.78	79.85	100.00	40.06	19.85	96.67
DISTRETTO TURISTICO DEGLI IBLEI	39.83	94.74	62.64	84.47	94.02	13.98	70.67
GOLFO DI CASTELLAMMARE	64.11	81.22	79.60	77.65	11.54	3.61	83.16
IL MARE DELL'ETNA	30.48	94.70	75.32	72.34	20.96	8.79	92.22
ISOLE E ARCIPELAGHI DI SICILIA	100.00	90.56	87.21	87.62	25.22	35.90	92.50
MONTI SICANI E VALLE DEL PLATANI	56.71	87.71	78.29	96.06	6.51	1.03	78.26
PALERMO COSTA NORMANNA	64.50	69.37	100.00	68.22	89.32	61.09	85.29
SELINUNTE IL BELICE E SCIACCA TERME	58.58	82.95	82.87	87.95	17.48	8.97	100.00
SICILIA CENTRO MERIDIONALE	31.01	95.80	56.25	73.55	4.13	0.84	53.33
SICILIA OCCIDENTALE	75.61	98.84	71.68	81.12	100.00	100.00	95.74
SIRACUSA E VAL DI NOTO	40.92	90.05	78.29	71.86	36.47	7.40	73.33
TAORMINA ETNA	69.87	100.00	84.50	75.07	89.97	52.76	90.18
TERRENO NEBRODI	43.92	90.05	80.81	54.72	35.31	13.73	77.14
THYRRENIUM TYNDARIS - PARCO DEI MITI	45.81	94.98	78.29	95.67	22.87	5.13	76.00
VALLE DEI TEMPLI	37.14	77.95	78.74	60.60	65.56	33.75	99.61

Preliminary results

THEMATIC DISTRICT	Inventory	Italian Stakeholders	Foreign Stakeholder	TQOL	ACT Residential tourism	ACT Incoming tourism	TIC
ANTICHI MESTIERI, SAPORI E TRADIZIONI POPOLARI SICILIANE	59.36	98.04	85.55	72.00	24.40	73.67	94.75
BORGHI MARINARI	61.71	90.86	83.03	65.05	16.45	23.78	87.35
DISTRETTO TURISTICO DELLE MINIERE	37.26	90.86	91.31	62.61	27.79	42.67	85.26
ECOSICILY - PARCHI, RISERVE E TERRE DEI NORMANNI	61.67	100.00	91.86	55.98	16.90	14.54	74.38
LE TERRE DEL MITO	60.23	90.86	90.64	68.28	6.07	12.18	70.09
PESCA TURISMO E CULTURA DEL MARE	71.80	92.23	92.50	60.26	18.72	26.82	77.33
SUD-EST	100.00	83.33	100.00	80.82	100.00	100.00	76.51
TARGA FLORIO	87.42	93.81	90.70	100.00	2.54	2.10	79.24
VINI E SAPORI DI SICILIA	65.35	77.73	86.37	74.55	23.85	71.63	100.00

Comparing Sicilian districts

Radar chart comparing Taormina-Etna and West Sicily across dimensions: Inventory, Italian Stakeholders, Foregin Stakeholders, TQOL, ACT Residential tourism, ACT Incoming tourism, TIC. Scale axis: 20, 40, 60, 80, 100.

Legend: Taormina-Etna, West Sicily

Comparing Sicilian districts

✓ Tourism Quality of Life Index and Incoming tourism attractiveness

TQUOL
- 67.26
- 67.27 - 78.15
- 78.16 - 89.56
- 89.57 - 97.09
- 97.10 - 120.15
- NESSUN DISTRETTO

ACT turisti incoming
- 41.97
- 41.98 - 536.67
- 536.68 - 853.76
- 853.77 - 1473.96
- 1473.97 - 2000.84
- NESSUN DISTRETTO
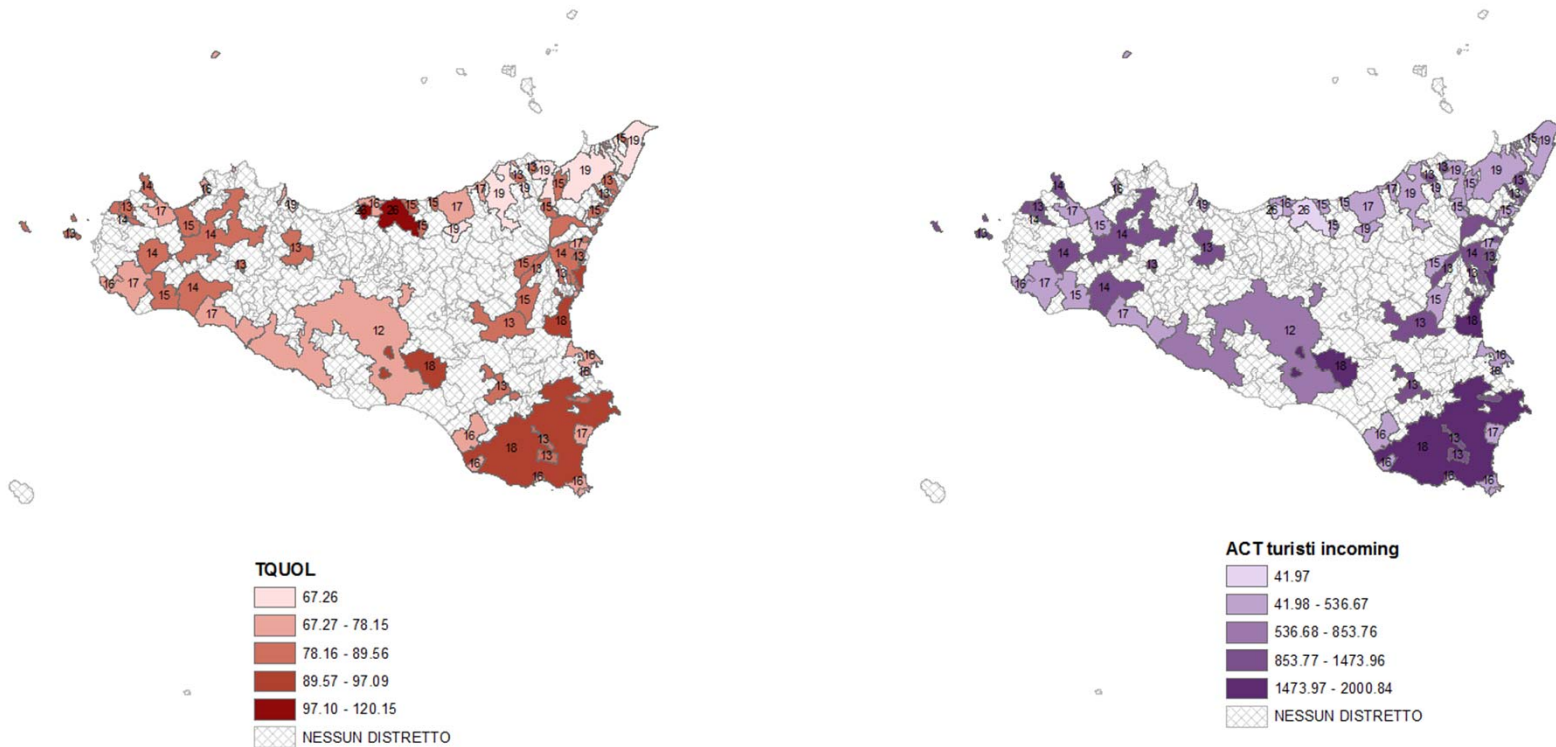
Relationship among indicators

✓ Spearman's Rank Correlation Coefficients among indicators

	Inventory	Italian Stakeholders	Foreign Stakeholders	TQOL	ACT Residential Tourism	ACT Incoming Tourism	TIC
Inventory	1.000	-0.254	0.417	0.483	-0.100	0.017	-0.133
Italian Stakeholders		1.000	0.034	-0.373	-0.339	-0.407	-0.220
Foreign Stakeholders			1.000	-0.167	0.333	0.117	-0.617*
TQOL				1.000	0.001	0.167	0.267
ACT Residential Tourism					1.000	0.933**	0.267
ACT Incoming Tourism						1.000	0.433
TIC							1.000

$* \ p < 0.1; \ ** \ p < 0.01$

✓ Kendall's W Coefficient of concordance

    ✓ $0 \leq W \leq \dfrac{1}{n}$ discordance among indicators

    ✓ $\dfrac{1}{n} \leq W \leq 1$ concordance among indicators $W = 0.214 \geq \dfrac{1}{n} = 0.0625$

Tourist mobility

✓ To analyze tourist mobility taking into account for the visited destinations

    ✓ 16% of visits were made in municipalities which do not belong to any territorial district

    ✓ 39% of visits were made in municipalities which do not belong to any thematic district

    ✓ Only 1% of visits were made in municipalities outside any tourism district

No. of destinations visited	%	% of movements within the same territorial district	% of movements within the same thematic district
1	71.82	-	-
2	14.29	11.96	6.09
3	5.87	9.70	8.29
4	4.10	9.28	16.85
5	2.17	10.86	40.68
6 or more	0.99	19.25	37.50
Total	100.00		

Competitor destinations

✓ Survey on incoming tourism

  ✓ Most of the people didn't considered alternative destinations: strong destination image

Italian regions	%
Sardinia	23.77%
Lazio	16.14%
Tuscany	11.21%
Apulia	10.76%
Campania	8.52%
Calabria	6.73%
Lombardia	6.73%
Veneto	5.83%
Others	10.31%
Total	100.00%

International destinations	%
Spain	18.93%
Greece	18.34%
Malta	8.88%
Balearic Islands	7.69%
France	5.92%
Portugal	4.73%
Turkey	4.73%
Croatia	4.14%
Creete	3.55%
Canary Islands	2.37%
Egypt	2.37%
Cyprus	1.78%
Others	16.57%
Total	100.00%

Comments and conclusion

- ✓ Multi-faced aspects of attractiveness and competitiveness
- ✓ Need for a multi-perspective evaluation of attractiveness and competitiveness: holistic *vs* reductionist approach
- ✓ Heterogeneity in the destinations and particularly in Sicilian tourism districts
- ✓ Fundamental tool for the implementation and the evaluation of tourism policies at a regional and sub-regional level

Thanks for your attention!

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