SCENARIOS AND FUTURE TRENDS OF DIGITAL TOURISM[1]

Luisa Carbone[2], Tony Urbani[3]

Abstract

The tertiary sector has been redesigned by two fundamental elements: the industrial revolution 4.0 and the spread of the Pandemic. Two factors that have transformed the traveller into an adprosumer of experiences, no longer the detached tourist or passive user of the attractions of a territory, but a producer and consumer of tourism attentive to lifestyles and sustainability, able to establish an authentic and deep relationship with the "liquid" places. Although lagging behind other sectors of the economy, tourism is also transforming, adapting to a new type of demand, becoming more flexible, developing specific proposals. The great change has therefore forced the supply to adapt to demand, overturning what were the foundations and the very substance of the traditional tourism business, giving rise to unexpected social and cultural digital practices.

Keywords: trend, digital tourism, pandemic, adprosumer, COVID-19

1. Introduction

For decades, tourism has been characterized by a highly standardized and structured offer, not very flexible, with stable distribution channels, a solid value chain and a rigid organization of the production system. The market was mainly governed by the offer and it was the tourist who had to adapt, without having any possibility of intervening in the process of construction and production of the tourist product they intended to consume. The Covid-19 pandemic has brought a profound transformation both from the point of view of demand – due to the decrease in travel between countries and the renunciation of the creation of events to avoid gatherings – and from the side of the progress of technology, which has decreed new models and perspectives in the sector. In fact, in 2020 Italy recorded a drop of -58.2% in arrivals (equal to 39.4 million fewer) and -53.3% in tourist numbers (equal to 154,1 million) with a decrease in foreign tourists of over 70 points and with a negative balance of over 116 million overnight stays, but, at the same time, the crisis has led to a new type of demand, which has benefitted the outdoor pursuits offer, away from the big cities, with short-haul short stays and last-minute bookings. All in all, however, some pre-existing behaviours to Covid-19 have been confirmed and that could therefore influence the restart of the sector, thanks to the affirmation of an intelligent narrative of the places, conveyed by

---

[1] Even in the unity of the text, the first and second paragraphs are to be ascribed to Luisa Carbone and the third one to Tony Urbani; the fourth paragraph is the result of the joint work of the authors.
[2] Luisa Carbone, Department of Humanities, Communication and Tourism (DISUCOM), University of Tuscia, Viterbo, Via Santa Maria in Gradi, N. 4, E-mail: luisa.carbone@unitus.it
[3] Tony Urbani, Department of Humanities, Communication and Tourism (DISUCOM) of the University of Tuscia, Viterbo, Via Santa Maria in Gradi, N. 4, E-mail: urbanit@unitus.it

the use of innovative discourses and technologies, which have also affected tourism and now promote a new perception of places. Increasingly innovative technologies have changed the scenario, favouring the growth of a pervasive tourist communication, computing or wireless connectivity, able to give life to unexpected social and cultural digital practices, and bringing to light the potential of three important competitive resources: geolocated information, network connection and citizen networks.

From this perspective, the proposals at national level aimed at bringing innovation and revival in the tourism sector have been many, but the implementation of digital services to support the tourist offer is one of the necessary ingredients to support and relaunch tourism in this difficult scenario: "quality, time-to-market and customer responsiveness ... are prerequisites for survival... the real competitive problem is laggards versus challengers, incumbents versus innovators, the inertial and imitative versus the imaginative" (Prahalad and Hamel, 1994).

2. The elements of post-Covid-19 tourism

The optimization of digital channels, therefore, will increasingly be a determining factor for the Italian tourism sector post Covid-19 (OECD, 2020), while the digitalization and automation of processes and operations will be decisive in increasing the safety of tourist venues, creating safer, more competitive and sustainable tourist experiences that can drive the recovery of the sector. The role of digital technology as an enabler of intelligent tourism is, in fact, the central theme of this period, as demonstrated by Mission 1 of the PNRR 2021-2027, titled "Digitization, innovation, competitiveness, culture and tourism", which is divided into three components: digitization, innovation and security in the PA (with an initial allocation of 9.72 billion euros); digitalization, innovation and competitiveness in the production system – Transition 4.0 – (with a budget of 23.89 billion euros); tourism and culture 4.0 (with a budget of 6.68 billion). In particular, the latter also includes the "Integrated Funds for the Competitiveness of Tourism Enterprises", which is the subject of a specific allocation (€1.79 billion). The intent is to promote the competitiveness of Italian tourism companies through sustainable tourism strategies, support for youth entrepreneurship and redevelopment of properties with high tourist potential. On the other hand, digital technologies have been the main ally of tourism, mitigating the impact of the Coronavirus and responding in a more agile and efficient way to the needs of potential users, or as it is now possible to define them, the user's generated content. For these reasons, the recovery of tourism requires the adoption of models of experiences with new channels of promotion and relationship able to facilitate the vision of the tourist. The undifferentiated offline, with a traditional, passive, one to many approach, must be integrated with the online, according to an innovative, active, many to many approach, able to generate value from the interactions of tourists and anticipate their needs. To ensure the evolution of the sector and therefore overcome the limits inherent in the fragmentation of the market, it is necessary to create a system, implementing actions that can enhance the distinctive elements of the country's tourist offer, and which, at the same time are able to promote mobility within the territory. Accommodation facilities will have to adopt flexible and resilient business models also leveraging digital tools to enhance the creation of tailor-made travel experiences and the level of customer loyalty.

The idea of sustainable, responsible, participatory tourism is outlined, where the tourist is not a passive receiver, but one who wants to intervene, express and challenge themself and who is, above all, attentive to the discovery of healthy and culturally relevant lifestyles for the communities to which they belong, far from mass logic, where technology becomes essential in enhancing the communities. In this regard, it should be emphasized that the tourist offer of small destinations was the first to restart after the lockdown, thanks to the accentuation of trends such as the healthier lifestyle, the psycho-physical well-being of people, the sustainability of travel and, above all, the attention to innovation and digitization. The digital revolution has changed the functioning mechanisms of the tourism chain, the business models of the operators and has accompanied the traveller in a constantly evolving physical and digital travel experience, increasingly the result of new needs and habits. However, the main challenge for tourism remains the need to develop a virtuous circle of eco-friendly flows, but also to simultaneously improve the prosperity of the host community able to preserve and enhance the cultural and natural heritage of the destination. The digital transition can enable a change of perspective with respect to a tourism supply chain, adopting an integrated approach along the entire supply chain: from trip planning to feedback on the experience. Not only mobility, therefore, but also services, hospitality, real-time information, tariff integration, which are able to increase the level of smartness of the supply chain. The measures put in place today, concretized by the concepts of the smart road, smart city, smart territory, and smart destination will shape the tourism of tomorrow through technological upgrading investments. There is, therefore, no doubt that the pandemic crisis has changed the sector, but has also generated an opportunity to rethink tourism for the future, both in the management of reputation, visibility of destinations and engagement, and in stimulating and re-thinking communities, but above all rebuilding trust and favouring solutions that, while taking into account social distancing – touchless, enable, at the same time, a positive travel experience.

3. The digital storytelling of the tourist experience

Compared to other economic areas, tourism has always been a traditionally slow sector and transformations have required long periods and dilated times. However, the rapid expansion of the cultural offer on the web during the lockdown has shown the general public, as never before, the range of possibilities for off-site use and for traveling remotely through cultural destinations. New digital experiences have been created for a type of cultural tourism defined as emotional. Apple operating systems together with AR Kit Android and Google Core have introduced applications that integrate the cultural tourism experience through virtual reality. Similarly, museum institutions, archaeological sites and monuments around the world have offered digital experiences with videos, 360° photographs or 3D reconstructions on their websites, on social platforms (Facebook, Instagram, YouTube and Twitter) and on Google Arts & Culture. These are solutions that increase the spatial web, able to offer experiences both in digitally mapped physical worlds and in newly created virtual worlds, through the help of wearables, smart glasses, RA/RV interfaces and the Internet of Things, which integrate perfectly into the physical environment, superimposing on each real object, digitally advanced copies – digital twins – and completely imaginary virtual worlds.

A cultural fruition that emphasizes the need to adopt an experience-centric perspective, shifting the focus from service to audience experience (Olietti and Musso, 2018) and going beyond the contrast between real and digital to consider online space as the opportunity to offer another type of experience (Ejarque, 2015). The service models for digital innovation in cultural tourism, therefore, can be traced back to three main types: phygital, digital first and #digitalonly. In recent years, the focus has been mainly on opportunities related to the development of phygital offers, i.e. when physical use is integrated with digital illustrative content. These are additional services that, by improving the on-site visit experience, can represent a real opportunity to relaunch cultural sites and allow the creation of new services for the tourism chain, interpreting a priori the needs of visitors-users in their different cognitive, sensory, and socialization dimensions, producing effective and measurable solutions, throughout all the different moments of its use, that is, before, during and after the visitor's journey. Compared to the past, the phases of the customer journey are divided into pre-booking, or the phase that precedes the booking of the holiday; stay, phase in which the tourist shares on social media selfies, photos of the places they visit, stories on Instagram, tags the restaurant and the hotel; the post-trip, when the digital tourist selects their photos, writes reviews on the places visited, thus triggering an important circle of useful information for potential new customers. The tourist is no longer a passive user, but is a user eager to get in touch with the digital destination in order to establish an authentic and deep relationship. From a model based on simple 'seeing' we have moved on to one of 'doing' that requires living experiences.

The transformation of demand has inevitably conditioned and changed the very way of distributing the tourism product and for tourism communication, digital content marketing has become of fundamental importance, understood as the set of practices of creation and sharing of relevant editorial forms to attract customers, involve them in an authentic way and one based on emotional experience. If the tourist has been described according to five characteristics: innovator, informed, impatient, deluded and unfaithful – the new digital media generally imply fresh narratives of tourism, which develop through four phases: brand building – the tourist compares different brand offers; brand activation – the tourist books, making use of communication platforms, such as blogs and review sites; customer service – the use of live chat, chatbots, but also WhatsApp and e-mail; and brand advocacy – the customer, in addition to making new purchases, also becomes a Brand Ambassador. In this context, storytelling becomes the most effective vehicle for recounting and narrating, leveraging the feelings and emotions of the user, with empathic and persuasive communication, capable of encouraging and supporting the sale of the tourist product, generating destination awareness and engagement. In fact, the goal of storytelling is to ensure that the receiver identifies with the messages of the destination by stimulating creativity and imagination through three fundamental points: a) reality, or maintaining their credibility, respecting the codes and values of their audience in order to address both the entire community and individual people; b) identity, be consistent with the vision of the destination, structuring the contents following the classic narrative; and c) interaction, generate word of mouth, creating from time to time content and materials of interest that provoke the user's reaction. In this context, tourist destinations that wish to be competitive and increase their level of attractiveness on the market must move from a destination model to a product and experience model that puts the new tourist at the centre of every choice, strategic decision and action, influenced by

visual storytelling (D'Eramo, 2017). A technique that attempts to establish a correlation between the narrative representation of reality and imagination (Gemini, 2015), involving the passionate traveller in the first person, transporting them directly into the most compelling contexts, making sure that it is the person themself who moves in the direction of the product-destination, to ensure that the experience exceeds the expectations of the visitor. The traveller will return satisfied with their experience only if the trip has given more than they expected. In this sense, the use of Social Networks such as Facebook, Twitter, Flickr, YouTube, Google+ or LinkedIn by tourism companies, represents an obligatory and revolutionary challenge, as does the implementation of dedicated spaces such as forums, blogs, podcasts, and applications for Apple and Android, increasing the degree of attraction and attention from users, who, at the same time, can create, publish and share just as much content, interacting, creating communities and fundamental engagement. All these tools, being within the reach of both the demand and the supply of tourism, create a context that is decidedly favourable, as well as disorienting and elusive for Italian destinations and beyond. In other words, the change is taking place from communication based essentially on conveying the attractions and resources of the place to new marketing focused instead on satisfying the needs of tourists, who are increasingly interested in carrying out activities of interest to them on site, sharing their passions and experiencing things for themselves. It is precisely this new attitude of tourists that represents a challenge and a great opportunity for tourist destinations to increase their prestige and reputation.

4. Digital trends

Digital is the change maker of the coming years, the main factor for the growth and transformation of the economy, as in past centuries were industrialization, international trade and globalization. Not only has digital changed the market, but also the priorities and organization of society and the public have been redetermined; digitalization policies are now considered indispensable for competitiveness, employment and skills training. In 2022, in such a widely accessible and entirely visual world, all this represents a real challenge to the preparation and preservation of the tourist destination. Today, in fact, the new traveller loves to share their holiday in real time, approximately 72% take photos and videos that they then publish on social media, and, once at home, 43% spend time posting their experience online: sharing photos, status updates, stories on Instagram. In every tourist destination a real social movement for tourism is spreading, in which, in addition to the already known platforms, new ones are continuously created, used by the various destinations to highlight their identity, strengths and activities. Somehow, the tourist becomes deeply intoxicated, always connected and very social, bombarded daily by a mass /abundance/ mountain of information and messages that strongly affect their process of selection and choice of destinations. In addition, communication tools have transformed it into an adprosumer (Carbone, 2016), which shares its experience, produces information, packages the product it wants and consumes it when it wants. We have thus gone from influencers who were previously in the circle of friends or acquaintances with whom the individual had close relationships, to influencers who do not socialize directly and who frequently do not even know each other.

In all this, the Electronic Word of Mouth (E-WOM) has a fundamental impact, the electronic word of mouth that keeps millions of unknown users in touch, providing immediate and lasting feedback, even more truthful, since often the guarantee of anonymity or the use of acronyms such as on review portals (online reviews), such as TripAdvisor, apparently gives more freedom to express oneself about the tourist experience. A recent study conducted in 2018 by Phocuswright, on behalf of TripAdvisor, found that the majority of active online travellers (83%) do not book a hotel or other accommodation facility until they read the feedback and comments of other travellers. It also turns out that 79% of TripAdvisor users read a minimum of six to a maximum of twelve reviews before finally choosing where to stay, while almost nine out of ten users would recommend the reviews posted to other travellers. Online reviews are therefore one of the most popular forms of e-WOM, precisely because they facilitate users in collecting a large amount of information about a product, a service, or a brand and in confirming or not their initial idea. Very often it can happen that people search for information without a real purchase intention, however this action, although not totally active, can influence future purchase decisions. Very often, therefore, today's demand tends to follow the trends of online reviews a priori, allowing itself to be largely influenced by the awareness that the territory or the structure receives online.

In the post-Covid phase it was the digital sector that could offer suggestions, information and security guarantees at the same time. In the future, the integrated booking service, essential for security, could also integrate augmented reality functions to obtain additional information on places, parking payments, weather alert communications, etc., always with a phygital approach. In addition, thanks to artificial intelligence, places, events and points of interest could be described and related to people's daily needs, tastes and interests, in order to suggest to them increasingly interesting content which matches their needs. At the beginning of 2020, when the spread of the pandemic was not thought about and the growth forecasts of the tourism sector were clearly rising compared to previous years, it was believed in any case that technological innovation would continue steadily. This is all the more true today: digital can be a way to relaunch a sector strongly damaged by recent events, but also to interpret and respond to the needs of tourists, which in a very short time, evolve according to desires and new trends.

References

Carbone L. (2016), La cartografia ai tempi del prosumer (producer+consumer) in Scanu G. (ed.), *Conoscere per rappresentare. Temi di cartografia e approcci metodologici*, Bologna, Pàtron Editore.

D'Eramo M. (2017), *Il selfie del mondo: Indagine sull'età del turismo*, Milano, Feltrinelli.

Ejarque J. (2015), *Social Media Marketing per il Turismo*, Milano, Hoepli.

Gemini L. (2015), *In viaggio: Immaginario, comunicazione e pratiche del turismo contemporaneo*, Milano, Franco Angeli.

OECD (2020), *Tourism Policy Responses to the coronavirus (COVID-19)*, OECD, https://read.oecd-ilibrary.org/view/?ref=124_124984-7uf8nm95se&title=Covid-19_Tourism_Policy_Responses.

Olietti A., Musso P. (2018), *Turismo Digitale. In viaggio tra i click*. Milano, Franco Angeli.

PNRR (2021-2027), Digitalizzazione, innovazione, competitività, cultura e turismo, *Italia Domani, il Piano Nazionale di Ripresa e Resilienza*, Next Generation.

Prahalad C.K., Hamel G. (1994), *Competing for the Future*, Cambridge, Harvard Business School Press.