

THE ROLE OF THE REGIONAL TOURIST BOARDS IN THE DESTINATION MARKETING POLICIES. THE CASE OF THE DOLOMITES

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ABSTRACT:

In recent years the scientific community has focused on the study of tourist destinations from a strategic-managerial perspective. Questions remain, however, regarding who can manage the destination as a system and facilitate coordination among local operators. In the light of a research conducted in the Dolomites (an Italian alpine region) this paper seeks to define some possible strategies for destination marketing by Regional Tourist Boards (RTBs) with a view to identifying the characteristics associated with an integrated tourist destination.

Key Words: *Regional Tourist Boards; destination marketing policies.*

EL PAPEL DE LAS OFICINAS DE TURISMO REGIONALES EN LAS POLÍTICAS DE MARKETING DE DESTINOS

RESUMEN:

A lo largo de los últimos años la comunidad científica ha centrado sus esfuerzos en el estudio de los destinos turísticos desde una perspectiva estratégico-gerencial. Quedan, sin embargo, cuestiones por resolver en relación con quién puede gestionar un destino en tanto en cuanto que sistema y facilitar la coordinación de los operadores locales. Tratando de aportar alguna luz en este sentido a partir de una investigación llevada a cabo en la región alpina italiana de los Dolomitas, el propósito del presente trabajo consiste en determinar algunas estrategias de marketing susceptibles de aplicación por las Corporaciones de Turismo Regionales, tratando de identificar las características asociadas a un destino turístico integrado.

Palabras Clave: *Corporaciones de Turismo Regionales; políticas de marketing de destinos.*

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1. INTRODUCTION:

Since the mid-1990s the scientific community has shown interest in the study of tourist destinations from a strategic-managerial perspective, thus spurring growth at an international level in the study of destination management (Keller, 1998; Bieger, 2000; Manente and Cerato, 2000; Pechlaner and Weiermair, 2000). Despite the numerous contributions to the literature on the topic, uniformity among researchers regarding the defining aspects and content of a destination has been sorely missing. From a conceptual perspective the most thorough approach considers the multiplicity of viewpoints when defining a destination and attempts to combine in a systematic vision the geographic boundaries, product offerings, and the prospectives for the demand and offering (Manente and Cerato, 2000; Matzler and Pechlaner, 2000; Pechlaner and Weiermair, 2000; Franch, 2002). An issue yet to be resolved is the identification of possible coordination mechanisms that make it possible to define an integrated tourist offering that is able to satisfy the needs and desires of diverse segments of the demand. The problem translates into the identification of management tools that can facilitate shared decision-making. This choice becomes even more complex when considering tourist destinations that are characterized by the presence of small- and medium-sized tourism enterprises (SMTEs). The search for a possible solution to the management of the destination should, in fact, consider the multiplicity of actors involved in the entire tourist offering, including the single operator (hotelkeeper, restaurant owner, shopkeeper, artisan, farmer, etc.), public tourist organizations, commercial operators, regional institutions and other enterprises operating in the region. The systemic approach to destination management should also consider the users of the destination: tourists as well as the resident population, that is those who are the living expression of the history, values and cultural traditions of the location. From a managerial point of view issues to be resolved have to do with the coordination among single operators within the destination.

The contribution of Rispoli and Tamma (1995) puts forth three different configurations (*point-to-point*, *network*, *package*) through which the offering can be provided: the configurations differ in terms of the system of relationships developed between the offering and the demand. Looking at the generally active role of the user and the often high level of control and regulation of the business environment, it is possible to identify different approaches to management. It is not possible to establish *a priori* which is the best approach without considering the territorial characteristics, type of business, the system of relationships among actors present and the specific market segments targeted and served. In any case, whenever we depart from the logic of the package holiday and large tour operators it becomes harder to identify an entity that can coordinate the activities of a system of businesses and therefore establish a more integrated tourist offering. In a context of SMTEs, in fact, the tour operator has a minor role in organizing all-inclusive packages and in channelling tourist flows toward specific destinations. In order to go beyond a development phase based on spontaneous entrepreneurship with weaker links among actors, it is necessary to identify an alternative development model. In places where SMTEs and *do-it-yourself* tourists come together it becomes particularly important to have a person or entity that coordinates the activities of the multiplicity of stakeholders who are directly or indirectly involved in the tourist sector; these coordination activities would be aimed at defining, promoting and selling an integrated tourist offering.

The tourist sector in the Alps has the characteristics of an offering system dominated by SMTEs and where the demand generally makes little use of travel and tour intermediaries when organizing the vacation. A research project covering destinations in the Alps (considering different areas of Italy, Austria, Switzerland, France, Germany and Slovenia) and analyzing the territorial tourist boards revealed that at the regional level there are no operators that sell all-inclusive packages (Franch and Martini, 2002). Field research and desk analysis found three different models of destination having different levels of coordination among actors and different roles for the Regional Tourist Board (RTB): a *fragmented* model of tourist destination, where coordination among actors is weak and promotional activities are limited to some localities, is contrasted with an *integrated* model where the role of RTBs is fundamental in terms of coordination among stakeholders and creation and promotion of the offering; in the *partially integrated* model the collaboration among actors is quite high and exists principally for purposes of advertising and promotion. Studies conducted in alpine regions highlight the strategic role of the RTBs in destination management and their unique capacity to carry out activities of meta-management. These studies also revealed that where the activities of RTBs are more structured and delineated, greater success resulted from policies and activities of destination management is achieved. Thus the RTBs have a role as facilitators in the definition of development strategies for the region. The involvement of public and private capital (and the corresponding shared responsibilities and risks) is important in favouring the definition of an offering system that is cooperative and collaborative. Indeed, the best results in terms of coordination of actors has been found in areas where a top-down approach is taken to defining and promoting tourist activities.

In light of these considerations, this paper looks at the behaviour of *do-it-yourself* tourists in some alpine regions, the aim being to identify possible strategies of destination management pursued by the RTBs to respond to the needs expressed by the demand segments served. The study analyzes tourist behaviour in the different phases of choosing a destination, and also looks at the attractions and features desired, and the satisfaction and loyalty of customers. The geographic area of the study includes the Italian Dolomite region, a mountainous area extending over the administrative regions of South Tyrol, Trentino and Veneto (Province of Belluno). In these areas tourism has taken on a growing importance, becoming for some valleys a decisive source of income and employment for local residents. The tourist offering in the Dolomites is distinguished by the presence of large numbers of SMTEs, mostly owned and managed by local residents and often family managed. Activities of promotion, information dissemination and “*welcoming*” of tourists is done by local structures, publicly managed in the Province of Belluno and privately in South Tyrol and Trentino. The diverse juridical form assumed by the territorial entities is the result of an important process of reorganization that involved –and is still in course in some regions– tourism promotion organizations in Italy. The process of privatization of the RTBs involved both South Tyrol and Trentino. In South Tyrol the board handles tourism promotion at a regional level as well as *Alto Adige Marketing*, a corporation set up in 2000 with equal public and private ownership (50% each). In Trentino tourism promotion is done by *Trentino S.p.A*, a joint-stock company operating in the region since June 2003; the role of the public entity in Trentino is significant (60 % Autonomous Province and 40 % Chamber of Commerce). In short, regardless of the juridical form taken, the role of public entities is determinant in promoting tourism in the region.

2. THE RESEARCH METHOD:

The locations included in the study were chosen because they are in the Dolomite region and also have a large tourist industry, as revealed from the number of bookings. The areas included from Trentino are Madonna di Campiglio, San Martino di Castrozza and Moena; in South Tyrol, Alta Badia (Corvara and La Villa), Val Gardena (Ortisei) and Alta Pusteria (Sesto Pusteria and San Candido); in the Province of Belluno, Cortina and Alleghe.

Data were gathered by means of an online questionnaire that was accessible only on computers made available by front office personnel of the Associations and Public Tourist Boards of the specific locations. The collaboration of the local tourist boards was a key factor in the success of the study; using these entities to administer the questionnaires made it possible to reach a wider and more diverse segment of tourists than would have been possible by administering the questionnaire only to the hotel and non-hotel accommodations sector. The presence and willingness of front office staff of the RTBs also made it possible to monitor the interviewees and therefore to guarantee accuracy and consistency during the information gathering stage and to assure that the questionnaires were given only to overnight tourists and not to day visitors, this so that only tourists who could express an opinion and assess a larger portion of the offering could participate in the study. The online questionnaire was designed so that it was impossible to exit if any items were left unanswered, thereby further guaranteeing a thoroughness in the responses.

The questionnaires were administered using a stratified sampling scheme (at a regional level) and a systematic scheme determined by a process involving the following phases:

1. The total number of questionnaires to administer was set at 5,000, thus guaranteeing a high level of precision in the estimators used (relative frequencies), which then translated into a high level of accuracy of the results obtained.

2. The rate of attendance was identified for the summer season (47 %) and for winter (53 %), the percentage relative to the total presences for both seasons (reference: calendar year 2000). The number of questionnaires to administer in each period was calculated by multiplying these percentages by the total number of questionnaires.

3. The number of questionnaires to administer in the different areas of the Dolomites was determined by constructing composition ratios of the presences in the different areas for the period of reference (summer or winter): the total presences in summer is indicated by N_E while N_{Ei} indicates the summer presences for the i -th area of the Dolomites. The composition ratio for this area will be obtained by:

$$\frac{N_{Ei}}{N_E}, \quad i = 1, 2, \dots, k$$

These ratios for the number of questionnaires to administer in the given period resulted in the number shown in Table 1.

In each area the questionnaires were administered within the single tourist organizations following a sequential (proportional) sampling scheme, meaning that the front line operators were informed of the number of people to be interviewed each day for the period of the study.

Table 1. Sampling scheme.

Season	Presences	Weight	Questionnaires to administrer	Questionnaires returned
Summer	3,873,473	0.47	2,363	2,308
Winter	4,324,124	0.53	2,637	2,602
Total:	8,197,597	1.00	5,000	4,910

The research was conducted during the summer 2001 (july-september) and winter 2001-2002 (january-march) seasons, purposefully avoiding the Christmas season. By conducting the study over such an extended period it was possible to describe with greater precision the behaviour of *do-it-yourself* tourists, and at the same time to avoid answers that were dependent on contingent factors such as specific groups of tourists in an area or unfavourable climatic conditions.

A total of 4,910 questionnaires were administered (2,308 of them in summer and 2,602 in winter), achieving a redemption rate of 98.2 % (97.7 % in summer and 98.7 % in winter).

The questionnaire is composed of 19 questions and is divided into four sections that cover different areas:

- a) The social-demographic characteristics of the *do-it-yourself* tourist.
- b) The means of organizing the vacation.
- c) The desires expressed by tourists and attractions sought, including an assessment of satisfaction and the relative importance of different factors.
- d) The study of the loyalty of tourists to the destination.

The first level of processing of the data was to determine a frequency distribution, make graphic representations and calculate synthetic measurements. Data were then studied using Correspondence Analysis (CA), a statistical technique commonly used to reveal relationships among modalities (or categories) of two or more discrete variables, usually qualitative. The aim is to construct a data matrix (contingency table), often quite complicated, and substitute it with a simpler one without sacrificing important information: this involves removing redundant information (*noise*) so as to render more clear and evident the relationships that exist among the characteristics considered.

Correspondence Analysis also makes possible to visualize the results of this “clarification” procedure in terms of points within a space, thereby facilitating the interpretation of the relations. So, this technique is a valuable tool for analyzing the existing associations among two or more qualitative variables, representing the categories of variables as points in a subspace of small dimension: categories with similar distributions will have points that are near each other within the subspace while categories with dissimilar distributions will have points that are distant from each other.

3. RESULTS OF THE RESEARCH:

Social-demographic characteristics of the tourists:

The majority of tourists who choose the Dolomites as a holiday destination are aged between 30 and 45 years old. The age categories generally remain the same for both seasons, with the exception of the *over-65* group which tends to have a higher number of presences in the summer season. Tourists in the youngest age band have higher presences during the winter season, when the number of students is highest. The educational level of tourists interviewed is higher than the national average: nearly half have a high school diploma and 37 % (the same in both seasons) have a university degree. The Dolomites appear to attract a medium-high segment of the tourist demand.

The tourists are predominantly Italians and, among the foreign tourists, Germans have the highest number of presences in the Dolomites in both seasons. Non-Europeans do not represent a significant segment of the market. The proximity of Dolomite locations is a determining factor (for both seasons) in the decision to use private transportation to reach the destination.

The family represents the group that visits the Dolomites with greatest regularity, however there are significant differences between the two seasons, and so, in summer more than 70 % of respondents spend the vacation with family and less than 20 % with friends; in winter, instead, while most presences are represented by families, the percentage is slightly lower than for the summer period, while the percentage of tourists vacationing with friends is more significant (30.2 %). The data also clearly show a limited presence of organized groups.

The guests interviewed were asked to estimate the per-person budget that they expected to spend during their stay and to choose from among the categories indicated in the questionnaire: *less than 500 €*, *between 500 and 1500 €*, and *over 1500 €*. The analysis revealed a propensity toward relatively high monetary outlays for the vacation: in both seasons the tourists envisaged a budget of up to 1500 € per person for the vacation.

In summer the guests stay in the Dolomites for one or two weeks (the two classes differ only by a few percentage points) while in winter the “*winter week*” predominates. Regardless of the period, guests tend to prefer accommodations in hotels (about 45 % in summer and just under 50 % in winter), *garni* and apartments. Fewer stayed in their own second house or opted for booking with a residence; campgrounds, farm holidays and staying with friends were also mentioned as accommodation possibilities chosen by tourists.

Organizational phases of the vacation:

The idea and decision to vacation in the Dolomites is closely linked to previous experiences of guests and to word-of-mouth testimonies, the latter influencing the decision of more than half of tourists visiting the Dolomites. The role of internet is limited, even if more widely used during the winter season among tourists when initially deciding to vacation in the Dolomites.

In fact, internet is the third most used source of information among potential guests in this season. Advertising campaigns, promotions on television and radio and in specialized publications or at tourism fairs are not particularly important in this decision making phase

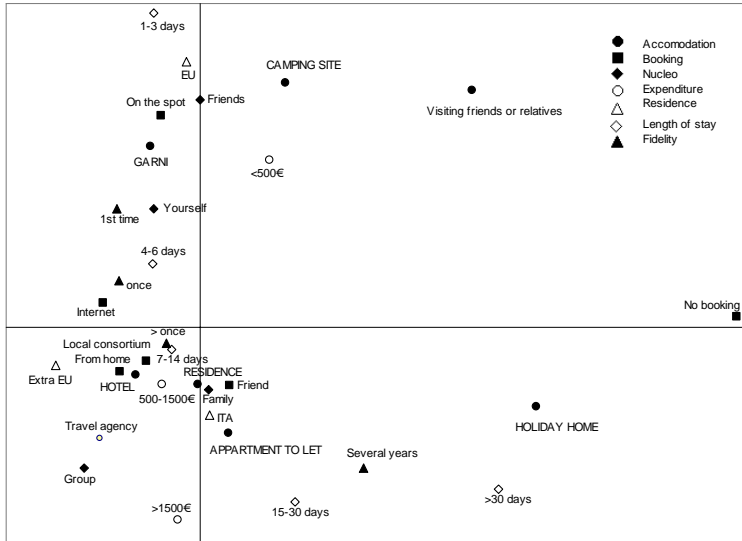
(indicated as important in less than 5 % of cases). A similar situation exists for travel agencies: less than 3% of guests make use of them when choosing a place to stay while nearly half of tourists contact the structure and book the accommodation directly. This tendency is higher in summer (45.6 %) than in winter (38.7 %). In winter the holiday is often more organized and more intermediated bookings take place along with contacts with groups, associations, and tourist consortia. Also significant for this decision making phase is the role of Internet: online bookings represent 17.3 % in winter (twice the amount taking place summer), making this the second most frequently used means of booking accommodation.

The data described thus far serve to demonstrate a strong tendency toward *do-it-yourself* tourism in the Dolomites, where guests come from short or medium distances and organize the vacation autonomously from the information-gathering stage to the final booking. From this perspective the database obtained from the research constitutes an important reference for a more general analysis of the behaviour of this category of tourists. The use of Correspondence Analysis made it possible to build profiles of tourists who spend their vacation in the Dolomites. The analysis brings to light an initial profile of family nuclei in the 46-65 age range with a high educational level and a high-level, well remunerated job. Tourists in this group are mostly Italian and their decision to vacation in the Dolomites was influenced principally by previous experiences. Guests in this group, in fact, indicated that they had already visited the Dolomites at least once or had been visiting the same location for several years. The second profile refers to tourists coming from outside Italy (Germans predominate among European groups) and from outside Europe; they fall into the under-29 age group and are visiting the Dolomites for the first time with friends or with organized groups. Internet, advertising, and word-of-mouth testimonies were the most common sources of information for these tourists during the decision making phase.

Some interesting results emerge regarding how tourists had the idea to vacation in the Dolomites. As noted, previous experience informed the decision of the first group and Internet, advertising and personal suggestions influenced the second. Regardless of the tourist season, the configuration of points obtained applying CA does not change in substance wherever the focus is moved between organization and booking of the holiday. Tourists whose idea is influenced by previous experience, in fact, tend to finalize their decision and make the booking by contacting the facility directly. Tourists who rely more on advertising, instead, search for further information to organize and book the holiday; they contact travel agencies, consortia and tour operators or they use Internet.

The analysis completed with CA made it possible to build two distinct profiles of tourists that are differentiated in the phase of information gathering and planning of the vacation (see Figure 1). The first group, composed mostly by Italians and also non-Europeans (if in lower percentages), rely on previous experiences both when deciding on the type of vacation and when choosing the precise location. In this case the booking is generally done by contacting the facility directly or through friends. The preferred accommodation is in an apartment, residence or hotel and the length of stay is usually two weeks, often longer in summer and usually only one week in winter; per-person financial outlays are between 500 and 1500 € Non-Italian European tourists have a different profile: they usually stay for fewer than seven days and prefer camping or garni, while per-person spending is not more than 500 € internet is a common means of booking the holiday for this group.

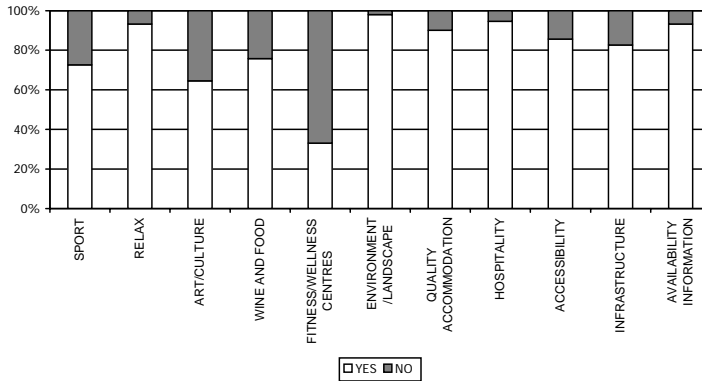
Figure 1. Organization of the holiday of tourists in the Dolomites: presentation through CA.



Dolomite attractions and features sought alter by tourists:

The principal attraction for summer tourists is the quality and beauty of the environment and landscape where they can relax and do sports or other outdoor activities. The high importance given to the natural environment was met with satisfaction by guests, over eighty percent of whom declared that they were very satisfied with the Dolomite environment (Figure 2).

Figure 2. Importance of attractive features of the Dolomites for summer tourists.



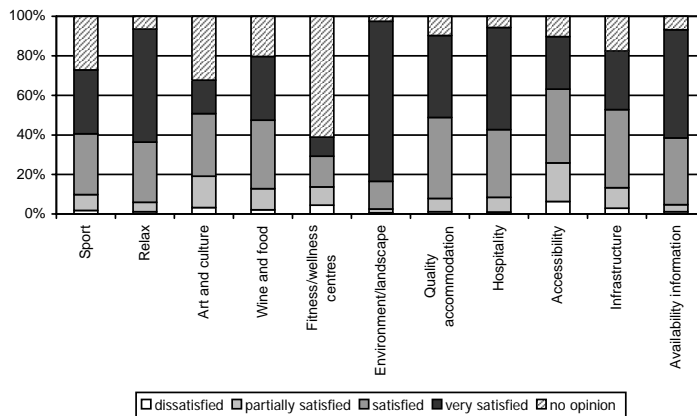
Guests were also attracted by other factors such as hospitality, availability of information and facilities, opportunities for relaxation, quality of accommodations, accessibility of the location and local cuisine. Less important were attractions related to art/culture and wellness. Overall the assessments made by guests were decidedly encouraging.

The majority of the guests expressed a high level of satisfaction. There was a positive correlation between the factors considered important by tourists and their degree of satisfaction with these items during their stay. Among those who gave little or no importance at all to a given attraction (particularly common for the wellness centers) the most frequently chosen answer was “cannot make a judgement”. This confirms that the opinions given by guests strictly adhered only to those products or services that were available at the destination and that they made use of (Figure 3).

The features desired by winter tourists are largely linked to skiing (one in four respondents indicated that they were interested only in skiing), yet a noteworthy 15 % of winter guests said that they did not ski at all. Numerous guests also looked for opportunities for other sports, relaxation and trekking on the marked trails. As for summer tourists, the environment and landscape also proved to be important for winter guests when deciding on a destination. Particular importance was given to items related to downhill skiing (variety and accessibility of slopes, snow conditions and maintenance, quality of ski lifts, crowding and management of flows), while less important seemed to be other sports (cross-country skiing, alpine skiing and snowboarding). Guests gave positive ratings to the winter attractions in the Dolomites, indicating high levels of satisfaction with most items in the survey.

The CA brings to light a greater propension among Italians to visit the Dolomites for downhill and cross-country skiing. Even though downhill remains the most popular type of skiing, non-Italians also expressed interest in alpine skiing and snowboarding.

Figure 3. Level of visitor's satisfaction with attractive features for summer season.



Customer loyalty:

The degree of satisfaction expressed by guests in the Dolomites has a positive impact on their decision to return, with nearly all tourists indicated that they would return for another holiday in the destination. This is in line with the levels of customer loyalty shown by guests who habitually visit the destination: those who have spent at least one holiday in the Dolomites represent at least 70 % of tourists interviewed, while just over 30 % are first-time visitors. The cycle of word-of-mouth testimony reinforces the positive picture that emerges: more than 90 % of guests would suggest the Dolomites as a vacation destination for friends and family.

4. CONCLUSIONS:

The research confirms the notoriety of the Dolomites as a tourist destination. The consistency of tourist flows and the high level of loyalty demonstrate that the development of tourism is a defining feature of the territory and at the same time serve to underline that the tourist product as it currently exists is in the mature stage of the product life cycle. If on one hand the destination can rely on a consolidated acquisition of at least part of the demand, it is also necessary to renew the product offered and to expand the services provided. This will guarantee also the future attractiveness of the Dolomites. This means considering some signals of potential weaknesses in the Dolomite offering coming from the market.

At an international level competition with destinations that are not mountainous has increased, while younger age groups are tending to find the tourist products offered by mountain destinations less attractive (Macchiavelli, 2002; Minghetti, 2002). Moreover, skiing, which since the 1960s fostered the development of tourism in the Dolomites even in both seasons, has undergone difficulties in recent years related to reduced snowfall, and costly investments required for the newest lift and snowmaking equipment and maintenance. Thus also the “*snow product*” must be renewed in so much as it also is in a mature stage of its life cycle (Hudson, 2000). The research also confirmed the varied interests in skiing, noting that fully 15% of tourists in the Dolomites have no interest whatsoever in this sport.

Given all this previously expressed, the analysis of tourist behaviour provides information that is useful when defining some strategies for further development of the tourist offering, and so an initial consideration arising from the characteristics of the main tourist segment is the uniqueness of the destination and that Dolomite locations should position themselves for and target a medium-high segment of the tourist market. Thus the aim would not be to look to the mass market but to focus on quality and an offering that takes advantage of and also conserves the very resources that constitute its attractiveness.

The profile of the “*loyal segment*” of tourists reveals a very high level of loyalty and a propension to contact the tourist structures directly to book the holiday. This serves to underline the need for intensified relationship marketing that focuses on the post-vacation phase.

The opportunities provided by information and communication technologies and particularly internet in this regard would favour contact with and among guests and set up virtuous circles of word-of-mouth testimonies. The creation of virtual communities, chat

groups and discussion forums would make it possible to augment the existing links between regular guests and the locations (Mich and Franch, 2003). The desire to expand the target market served would, however, imply the definition of more aggressive promotion and commercialization strategies. It would be useful to pursue contacts with tourist intermediaries that deal with the same type of offering, such as tour operators specialized in niche markets and who are interested in commercializing the unique tourist offering of the Dolomites. Such relationships would make it possible to promote the Dolomites in new and more distant markets that are not easily accessible to single local actors. Also in this case a greater use of Internet and the realization of web sites for the locations would grant greater visibility to the destination on the market (Buhalis, 1998; Martini, 2000).

The considerations made thus far demonstrate the need for destinations to identify an individual or entity that is able to define strategies of relationship marketing and policies of promotion and commercialization. It is equally necessary to coordinate the activities of the different stakeholders in order to propose an integrated tourist offering that can satisfy the needs expressed by diverse segments of clientele. In the Dolomites, as in other alpine regions, the RTBs prove to be the most well equipped to undertake these tasks. They have a unique familiarity with the territory, its products and local resources and are able to identify the needs of local operators and monitor fluctuations and movements of tourists and therefore understand the needs also of the demand side. These entities therefore are able to manage the destination as a system. At the same time the RTBs do not have the characteristics associated with a business because:

1. They do not own territorial resources.
2. They do not have direct control over local operators.
3. The relationships among diverse stakeholders are not hierarchical.
4. Operators and territorial boards do not necessarily have the same objectives.

It can be said then that for the RTBs to be able to carry out operative and strategic activities they must gain the political legitimacy required to operate in the territory. The sharing of objectives of the RTBs and local operators provide the conditions to launch projects for the development of tourism in the territory and the creation of web sites for the destination. A lack in shared vision and planning for the tourist destination and the poor participation of local operators in RTB-sponsored initiatives.

In fact, severely limits possibilities for effective development of the destination and the realization of efficient destination management systems. Greater coordination among local actors and the RTBs and establishing more shared aims would induce tourist destinations to aspire toward a model of integrated destination.

In the near future it is hoped that the RTBs take on a strategic role also in activities of commercialization of vacations and tourist products. A recent research by the eTourism group (Franch *et al.*, 2005) on hotelkeepers in tourist destinations in the Italian-French alpine regions found that indeed the RTBs are the entity that operators collaborate with most and yet there is little propension among these actors to build relationships but rather widespread tendency to act individually, thus creating an obstacle to the systemic management of the destination.

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