Italian seaside destinations in comparison. The brand image assessment for destination branding co-creation[1]

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The purpose of this paper is to propose a methodology for the assessment of a destination's image on the web. The study builds up a picture of 26 Italian coastal destinations through indexes and highlighting the reputation of the tourism services (attractions, restaurants, and accommodation). This can be a useful tool for destination managers to help monitor their destination's online reputation and support the brand-building and management through a co-creation.
Keywords: destination image; web reputation; seaside destination; co-creation; social network.

Le destinazioni balneari italiane a confronto. La valutazione della *brand image* per la co-creazione del branding di destinazione.
Questo lavoro propone una metodologia per la valutazione della web reputation di una destinazione turistica. Lo scopo è di analizzare la competitività di 26 destinazioni balneari italiane mediante l'utilizzo di dati UGC di TripAdvisor sui servizi turistici (attrazioni, ricettività e accoglienza). Il risultato è la creazione di uno strumento basato su indici quanti-qualitativi, funzionale al monitoraggio e alla gestione dell'immagine di una destinazione attraverso un processo di co-creazione.
Parole chiave: immagine della destinazione; reputazione online; destinazioni balneari; co-creation; social network.

Introduction

Nowadays, destinations have to cope with several challenges to attain, and then maintain, their competitiveness. Competition among destinations is usually not focused on a single aspect of the tourist product (environ-

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mental resources, transportation, tourism services, hospitality, etc.), but on the tourist destination as an integrated set of tourist facilities, that is composed to meet the needs of the tourist demand (Buhalis, 2000; Ritchie and Crouch, 2000). The dynamic nature of the competition among tourist destinations forces the destinations to be able to combine and manage their own resources in order to gain a competitive advantage (Teece *et al.*, 1997). Consequently, tourist destinations have to employ the so-called "dynamic capabilities", or rather, they have to be able to «integrate, reconfigure, gain and release resources to match and even create market change» (Eisenhardt and Martin, 2000). Hence, destinations have to be innovative, distinctive and continuously seek to improve the tourist experience and their overall satisfaction in order to maintain competitiveness in the global tourism marketplace.

One of the most important sources of a competitive advantage is the uniqueness of a destination in the market and its visibility, which can be both achieved through a well implemented destination branding process (Blain *et al.*, 2005). Without doubt, brands have been considered the marketer's key tool for creating and improving product differentiation and competitiveness, and (re)branding processes have been occurring in many nations over the last few decades. Accordingly, it can be argued that the destination branding process represents an important determinant of a destination's competitive position in the global tourism marketplace, and good performers in destination branding implementation are more competitive (Miličević *et al.*, 2017).

In order to offer proposals of value to their potential customers, managers need to identify their destination's most valuable attributes as well as those which need to be improved. Hence, marketing managers try to establish an interaction with end-customers, both online and offline, to foster and encourage value co-creation and exchange, that helps adjust the strategies and the image-formation process that constitutes the core of branding. In fact, the involvement of end-customers (Cherif and Miled, 2013) can improve the quality of services and the provision of customized products (Hafeez and Aburawi, 2013).

According to Micera and Crispino (2017), a destination's online reputation is a valid "smart tool" for image building and assessment, because the web allows for the collection of data, generated by the users, on both the image and the online reputation of a destination. Online social platforms, such as TripAdvisor, provide a collaborative environment that enables stakeholders to acquire data and share knowledge (Xiang and Gretzel, 2010). In addition, the communication tools that tourists use to share their experiences, such as online social networks or review sections, impact the community's behaviors and affect tourists' decision-making process in choosing a destination.

This paper aims to provide a methodological framework for a destination's brand-building, a process based on an analysis of UGC on TripAdvisor, that allows the collection of data on the online image of the top 20 Italian seaside destinations. In particular, the objective of the study is to provide a "smart tool" to assess the competitiveness of the primary offer of Italian seaside destinations from a tourist perspective, drawing attention to the distinctive traits and critical issues of each destination. This can then be used to support destination managers and policy makers in positioning and repositioning in the global market, through the development and management of a competitive brand.

1. Literature review

The concept of tourism destination competitiveness has become increasingly more significant in tourism literature (Heath and Wall, 1992; Ahmed, 1991; Pearce, 1997) and the complexity and scale of the concept emerges from several attempts and approaches by researchers to define and measure it (Crouch and Ritchie, 1999; Enright and Newton, 2004; Ruhanen, 2007; Cracolici, 2005; Cracolici and Nijkamp, 2006; Mendola and Volo, 2017; Fernández *et al*., 2020). The ambiguity and the wide variety of perspectives on competitiveness makes it difficult to give an operational or conclusive definition and how to measure it (Mazanec and Ring, 2011; Navickas and Malakauskaite, 2009). The competitiveness of a destination is conveyed in its ability to create value-added products while maintaining market position (Hassan, 2000) and deliver services or goods with attributes considered to be important by tourists that perform better than other destinations (Dwyer and Kim, 2003). Despite several other definitions provided by the literature, the definition of destination competitiveness can be summarized as the overall ability of a destination to provide goods, experiences and services that outperform other destinations and maintain or improve its position in the tourist marketplace relative to its competitors (Craigwell and Worrell, 2008; d'Harteserre, 2000).

The Organization for Economic Cooperation and Development (OECD) defines tourism competitiveness for a destination as «the ability of the place to optimize its attractiveness for residents and non-residents, to deliver quality, innovative, and attractive (e.g. providing good value for money) tourism services to consumers and to gain market shares on the domestic and global market places, while ensuring that the available resources supporting tourism are used efficiently and in a sustainable way» (OECD, 2014, p. 7).

The literature indicates that the competitiveness and its subjective elements can be assessed and measured from different perspectives: some scholars have adopted the demand perspective, some the supply one, using qualitative or quantitative approaches, giving a significant contribution in the development of models with exhaustive lists of indicators (Abreu-Novais *et al*., 2018; Zehrer and Hallmann, 2015). Integrating all of this information requires building indicators that aggregate or synthesize a set of individual variables representing the dimensions of the phenomenon to be measured (Croes and Kubickova, 2013). Despite the significant amount of research that revolves around competitiveness, relatively few studies focus on evaluating competitiveness from the tourists' perspective.

In the last years, initiatives that discuss the need to monitor and measure the competitiveness of tourist destinations have increased significantly (Mazanec *et al*., 2007), since such measurement can contribute to defining the strategies, prioritizing the actions and allocating the resources aimed at benefitting the sector and the destination (Barbosa *et al*., 2010). Destination brand development has become a strategic tool due to ever-increasing competition among destinations. In particular, brands have become one of the key determinants of a destination's success, along with its products and price (Morgan *et al*., 2004); Dwyer and Kim (2003) recognized a destination's image as a factor influencing destination competitiveness, but the destination branding process in not explicitly tackled.

The rationale behind branding is that consumers perceive a difference among brands in a product category, and that a distinctive and unique brand is resilient, according to Qu, Kim and Im (2011). They argue that a competitive tourism destination needs to create a positive and strong brand in order to increase repeated visitations and attract new tourists. In addition, the authors agree that a destination's image, created through a destination's branding process, directly influences the intention to visit a destination again. In fact, destination brand represents the emotional component of destination image, therefore only branded destinations can establish emotional connection with the potential visitors (Ekinci, 2003). Nowadays, the need for destination branding has become a priority, more than ever before, since today's destinations offer excellent attributes, such as accommodations and attractions, high-quality services and facilities (e.g. restaurants), and almost each destination claims to have unique culture and heritage (Morgan and Pritchard, 2005; van der Zee *et al*., 2020). Therefore, it can be argued that the process of destination branding has become necessary for destinations to maintain their competitiveness in a global tourism marketplace.

Regarding the operationalization of destination competitiveness, relevant research has so far not achieved a consensus on the best measurement practice, indeed quite different approaches are taken across studies. Generally, there are two different approaches to measure destination competitiveness: one involves using "hard data", the other by using "soft data" (Kozak and Rimmington, 1999). While "hard'' data typically employ indicators such as tourist arrivals or receipts, "soft data" uses variables more related to marketing, such as tourist satisfaction. The "hard data" approach is much more widespread in tourism competitiveness research; however, the "soft data" approach has recently been advanced by several researchers since soft data undoubtedly represents an important source and a key indicator to measure destination competitiveness (Israeli *et al.*, 2006; Žabkar *et al.*, 2010). Compared to hard performance indicators, the intangible indicators of soft data are becoming a popular tourism performance measure, as they are more in line with the intangible character of the service-oriented tourism industry (Huang *et al.*, 2007; Kozak, 2001; Sigala *et al.*, 2004).

Moreover, in recent years, decision makers have reported difficulties in the use of official statistics in public policy: excessively long publication delays, insufficient coverage of topics of interest and the top-down process of data creation. The data available on the web represents a potential answer to this issue, with social media data in particular presenting a possible alternative to traditional data (Severo *et al.*, 2016). Social media provides platforms for consumers to share experiences in their social networks and evaluate businesses through websites that feature reviews and recommendations on destinations, products and services.

These practices of posting information on frequently visited websites can build or destroy the reputation of a business organization (Ghose and Ipeirotis, 2009). Reputation is an essential component of destination competitiveness (Vengesayi, 2003) and it is linked to image. Whether the identity of a destination concerns its intrinsic characteristics and how it presents itself to the public, the image is the perception of the destination held in the mind of potential visitors. Reputation is created on the basis of information, generated by behaviors, actions and activities carried out at different levels. Many authors have emphasized the role of reputation in the tourism sector, as customers are more attentive and inclined to choose a destination depending on its reputation (Sirakaya and Woodside, 2005). To define destination web reputation, Minghetti and Celotto (2016) underline that the reputation of a destination is the result of the social assessment the public expresses of the place: it is derived from the image every person has of the destination's identity and then depends on the alignment between identity and image.

Several authors (Tussyadiah *et al.*, 2011) have shown that destination web reputation depends on both the positive and negative opinions that are exchanged on the web through social media and on how widely these comments are being shared. Tourists nowadays are well informed and have access to global market thanks to the wider application of ICTs in tourism, which are having an increasing impact on the achievement of destination competitiveness and enhance the value co-creation process (Cimbaljević *et al.*, 2019). The multidisciplinary assessment of these aspects allows one to monitor the competitive positioning of the destination, thus supporting the decision making of destination managers engaged in the image-building and destination branding process (Coca-Stefaniak and Andres, 2014). On this basis, the paper proposes the application of a methodological framework useful to monitor web reputation, web image and assess user-generated content for destination management and marketing choices.

2. Seaside destinations and the G20 Italian network

Coastal and maritime tourism are considered among the fastest growing sectors in previous decades, and the largest segments of the tourism industry (Honey and Krantz, 2007). However, they are expected to face several challenges in the next few years. Therefore, it is important to improve the competitiveness of the sector, as a significant number of Mediterranean destinations are characterized by maturity or even decline, according to the Butler Model (Butler, 2011). One of the primary challenges the European and Italian coastal tourism industry has to tackle is the decline of the "sea&sun" model, which urgently calls for new strategies to become more competitive and to redefine the services traditionally offered. Therefore, in order to remain competitive, marine destinations have to diversify their traditional offer by adding new products and experiences and high-quality standards.

Concerning Italy, tourism is a key asset of the economy and coastal tourism has a dominant position in the Italian tourism industry. Small coastal municipalities, which are only 13% of the top 50 Italian municipalities in terms of number of visitors, contribute more than 50% of the total number of visitors at national level. The twenty most visited municipalities manage to attract almost 70 million tourists, around the 16% of visitors at national level. G20 Spiagge Summit[2] arises from the awareness of the necessity to redesign the strategic development of Italian seaside destinations. As local authorities play an important role in tourism management through their planning activities and policies, the G20 Spiagge is proposed to be a network of mayors and regional councillors of the most visited coastal municipalities in Italy, that would cooperate in order to identify new and

[2] The term "spiagge" has been chosen by the G20 Spiagge Summit to easily identify the core product – the beach – of the G20 destinations and each destination correspond with its municipal administrative territory.

joint guidelines for Italian coastal destination's development and competitiveness. The participating members represent the 26 most visited coastal municipalities in Italy, who discuss and tackle the critical issues in the sector and foster the exchange of good practices, supported by technicians, scholars, representatives of trade associations and decision makers (tab. 1).

Tab. 1 – Overview of the G20 Spiagge Summit destinations, year 2019 last season before Covid-19

Rank	*Region*	*Destination*	*Arrivals*	*Overnight stays*	*Total beds*	*Occupation rate*
1	Emilia-Romagna	Rimini	1.802.870	7.376.990	73.827	27%
2	Veneto	Cavallino-Trep.	777.041	6.310.266	71.283	24%
3	Veneto	San Michele al Tagliamento	780.560	5.719.540	97.411	16%
4	Veneto	Jesolo	1.211.433	5.664.409	70.398	22%
5	Veneto	Caorle	659.609	4.469.901	63.861	19%
6	Friuli V. Giulia	Lignano Sabbia.	659.866	3.584.952	66.831	15%
7	Emilia-Romagna	Riccione	842.171	3.559.615	35.920	27%
8	Emilia-Romagna	Cervia	776.522	3.553.112	36.174	27%
9	Emilia-Romagna	Cesenatico	549.076	3.327.357	35.728	26%
10	Campania	Sorrento	671.149	2.467.279	16.692	40%
11	Emilia-Romagna	Comacchio	313.457	2.433.211	41.869	16%
12	Emilia-Romagna	Bellaria-Igea M.	391.371	2.198.974	29.852	20%
13	Puglia	Vieste	294.272	1.987.403	42.551	13%
14	Emilia-Romagna	Cattolica	343.111	1.846.672	19.352	26%
15	Veneto	Chioggia	251.950	1.426.833	28.726	14%
16	Toscana	Castiglione della Pescaia	225.333	1.361.859	20.268	18%
17	Friuli V. Giulia	Grado	295.062	1.355.334	23.673	16%
18	Campania	Forio	208.281	1.317.686	8.132	44%
19	Toscana	San Vincenzo	161.505	1.169.389	14.233	23%
20	Campania	Ischia	217.107	1.165.838	7.980	40%
21	Sardegna	Arzachena	208.820	1.149.277	14.868	21%
22	Toscana	Orbetello	198.941	1.106.798	19.309	16%
23	Veneto	Rosolina	146.790	1.091.229	22.235	13%
24	Toscana	Grosseto	233.468	1.082.521	19.655	15%
25	Toscana	Viareggio	246.194	1.066.641	16.625	18%
26	Sicilia	Taormina	336.142	1.065.937	8.250	35%

One of the next steps of G20S is to launch and promote the G20 Spiagge as a brand of the macro-seaside destination "Italy" on the market. Whether the G20S' stakeholders-members have already raised awareness of the network's overarching vision and brand identity, the next difficult task will be the creation of a brand that express the values and characteristics of G20S destinations for tourist purposes and can fulfill tourists needs and expectations. It is challenging to create and develop a destination brand of a network of well-known destinations, but, as previously mentioned, it can be improved via customers' value co-creative behavior, that can potentially increase the market coverage, innovativeness, profitability (Füller *et al*., 2011), and reputation.

3. Data and methodology

User-generated content, peer-to-peer websites and applications (such as tourism-related social networks) have become one of the most important sources of information for tourists (Del Chiappa *et al*., 2018). In particular, online review platforms have an increasingly important role in influencing users' behavior, including tourism-related behavior (Gursoy *et al*., 2017; Ye *et al*., 2011; van der Zee and Bertocchi, 2018). On these platforms, users share content and opinions, providing a rich array of data and feedback that fellow users can utilize to draw inspiration from, as well as guiding their own tourism-related decisions. Indeed, review platforms are significant drivers of tourist's decisions (Gursoy *et al*., 2017).

This paper uses data drawn from TripAdvisor, one of the most widely used online review platform. On top of being the most widely used website for tourism-oriented reviews, and one of the most influential, TripAdvisor is also one of the most widely investigated review websites in tourism literature (Duan and Zirn, 2012; Yoo and Gretzel, 2008), and this eases comparison with other locations. TripAdvisor collects reviews made by registered users, and these reviews can be read by registered and unregistered users alike. TripAdvisor users can choose to disclose personal information such as their location, gender, and age bracket. Each individual review is comprised of a numeric score (on a 1 to 5 scale), a written review with a title, the date the review was made, and the date (month and year) of the visit – up to 12 months beforehand; this implies it is impossible to leave a review for a visit that is older than a year.

Data for this study was retrieved from TripAdvisor and was collected in December 2019. An initial section of collection select basic information and the individual URLs for all the establishments and attractions in every G20 location; after the removal of duplicates, this resulted in an initial dataset that included the name, URL and location for each establishment.

A second step retrieved further information from each individual URL in the initial dataset: among the data extracted in this stage we have included the score of the reviewed place, the number of reviews, the distribution of 1-to-5 scores, a description of the services offered. We considered the ratings based on reviewers from any location, and reviews in any language. After cleaning-up and removing duplicate entries, the total number of entries in our database revealed that we had collected data for 14,640 individual establishments or attractions across the 26 G20 locations: 5,853 restaurants, 6,981 accommodations, and 1,806 attractions. The category "Attractions" includes point of interests, museums, tours and activities. The ratings reflect a total of 2,325,003 individual reviews: statistics for each location can be found in tab. 2. For each location, the table summarizes the number of restaurants, accommodations and attractions; the total number of ratings for each category; and the average rating for each category.

The average G20 location counts 225 restaurants, 269 accommodations, and 69 attractions. Without adjusting for either size or tourist overnights, Rosolina is the location with the fewest restaurants (53) and accommodations (30), while Rimini has the highest count for both (839 restaurants and 1166 accommodations); in terms of attractions, Cavallino-Treporti has the smallest number (16), and Rimini the highest (318). Rimini is the location with the highest average rating for restaurants (4.4), while Forio has the lowest average rating (3.7). Grosseto and Sorrento score the best in terms of accommodations (4.4), while Rosolina scores the worst (3.7). Rosolina is also the location with the lowest rated attractions (3.6), while the highest average rating (4.3) is shared by Arzachena, Bellaria-Igea Marina, Forio, Ischia, Lignano Sabbiadoro, Riccione and San Vincenzo.

For each location and type of attraction we compute a quality index, which is defined as follows:

$$Index_{t,l} = \frac{\sum_1^N (r_{t,l,n} \times s_{t,l,n})}{\sum_1^N R_{t,l}}$$

where $r_{t,l,n}$ is the number of ratings for a given attraction n, $s_{t,l,n}$ is the TripAdvisor score for the same attraction n, $R_{t,l}$ is the total number of ratings for all the attractions of type t in the location l, and N is the total number of attractions of type t in the location l.

For each location l we compute four different quality indexes: $Index_{rest,l}$ measures the quality of the restaurants in location l, $Index_{hotel,l}$ measures the quality of accommodations in location l, $Index_{attract,l}$ measures the quality of attractions in location l, and finally $Index_{total,l}$ summarizes the overall quality of all the establishments and attractions in the location l. Equal weight is given to all three dimensions (food, accommodations, attractions). In Table 3 we summarize the four quality indexes we have

Tab. 2 – Descriptive statistics of establishments and their ratings over the G20 locations

Location	*E*	*R*	*AR*	*E*	*R*	*AR*	*E*	*R*	*AR*	*E*	*R*
Average	*225*	*45.193*	*4,00*	*269*	*36.168*	*4,09*	*69*	*8.062*	*4,12*	*563*	*89.423*
Arzachena	235	43.644	3,93	218	25.475	4,29	80	9.620	4,26	533	78.739
Bellaria Igea Marina	121	20.736	4,19	341	36.377	4,19	58	2.625	4,25	520	59.738
Caorle	175	27.238	3,85	270	14.959	4,02	41	3.534	4,15	486	45.731
Castiglione della Pescaia	205	36.946	3,91	126	12.463	4,15	29	2.234	4,02	360	51.643
Cattolica	139	28.235	4,01	245	46.789	4,22	27	9.815	4,24	411	84.839
Cavallino Treporti	81	9.924	4,06	94	11.095	4,10	16	475	4,00	191	21.494
Cervia	348	63.637	4,10	415	63.281	4,06	194	12.072	4,18	957	138.990
Cesenatico	304	57.789	4,08	320	47.376	4,08	89	10.441	4,13	713	115.606
Chioggia	195	27.216	3,76	125	8.480	4,01	70	2.826	3,96	390	38.522
Comacchio	293	35.847	3,75	117	8.916	4,07	69	3.805	4,00	479	48.568
Forio	104	23.641	4,19	181	31.878	4,11	21	4.895	4,26	306	60.414
Grado	118	17.770	3,91	109	5.975	3,97	19	1.465	3,94	246	25.210
Grosseto	389	38.433	4,00	214	12.177	4,44	56	3.929	4,23	659	54.539
Ischia	304	57.884	4,18	141	29.935	4,12	24	8.241	4,34	469	96.060
Jesolo	354	54.936	3,90	453	53.290	3,96	46	6.934	3,91	853	115.160
Lignano Sabbiadoro	168	31.423	3,82	301	17.078	3,90	43	3.687	4,26	512	52.188
Orbetello	143	27.089	3,83	134	13.606	4,03	57	3.356	4,08	334	44.051
Riccione	60	41.719	4,43	435	86.141	4,17	105	15.284	4,30	600	143.144
Rimini	839	159.341	4,02	1.166	165.072	3,96	318	31.405	4,18	2.323	355.818
Rosolina	53	5.312	3,87	30	2.013	3,74	20	374	3,58	103	7.699
S. Michele al Tagliamento	169	21.010	3,89	277	10.891	3,96	22	3.049	4,10	468	34.950
San Vincenzo	104	20.066	3,81	78	9.411	4,18	18	2.426	4,31	200	31.903
Sorrento	255	132.970	4,26	411	116.791	4,40	74	12.958	4,16	740	262.719
Taormina	220	83.197	4,11	337	55.739	4,24	79	35.273	4,11	636	174.209
Viareggio	278	60.359	4,12	135	14.921	3,87	179	8.430	4,00	592	83.710
Vieste	199	48.666	3,93	308	40.244	4,22	52	10.449	4,10	559	99.359
Total	*5.853*	*1.175.028*		*6.981*	*940.373*		*1.806*	*209.602*		*14.640*	*2.325.003*

E = Establishments; R = Reviews; AR = Average Rating computed for each G20 destination: the higher the score, the higher the overall quality for a given destination; the lower the score, the lower the overall quality. Riccione is the destination with the highest quality index for restaurants, while Comacchio has the lowest. In terms of accommodations (which includes hotels and extra-hotel sector), Sorrento has the highest quality index and Rosolina the lowest. As for attractions, Bellaria-Igea Marina scores the highest and Cattolica the lowest. In terms of overall quality, Riccione has the highest quality index and Orbetello the lowest.

Tab. 3 – Quality index by sector for G20 destinations

Destination	*Restaurant Index*	*Accommodations Index*	*Attractions Index*	*Overall Index*
Arzachena	4,049	4,200	4,162	4,112
Bellaria Igea Marina	4,150	4,373	4,388	4,296
Caorle	4,010	4,139	4,250	4,070
Castiglione della Pescaia	3,976	3,984	4,017	3,980
Cattolica	4,080	4,403	3,775	4,223
Cavallino-Treporti	3,986	4,257	4,216	4,131
Cervia	4,030	4,231	4,234	4,139
Cesenatico	4,110	4,195	4,236	4,156
Chioggia	3,834	4,009	4,162	3,896
Comacchio	3,771	4,256	4,245	3,897
Forio	4,297	4,108	4,259	4,194
Grado	3,960	3,885	4,386	3,967
Grosseto	4,070	4,264	4,290	4,129
Ischia	4,210	4,099	4,346	4,187
Jesolo	4,002	4,173	4,019	4,082
Lignano Sabbiadoro	3,821	4,076	4,040	3,920
Orbetello	3,846	3,911	4,119	3,887
Riccione	4,334	4,392	4,221	4,357
Rimini	4,098	4,198	4,191	4,152
Rosolina	4,061	3,822	4,282	4,009
San Michele al Tagliamento	3,903	4,271	4,112	4,036
San Vincenzo	3,841	4,097	4,292	3,951
Sorrento	4,247	4,433	4,362	4,335
Taormina	4,209	4,378	4,337	4,289
Viareggio	4,116	4,090	3,970	4,097
Vieste	3,977	4,205	4,307	4,104
G20_average	4,038	4,171	4,201	4,100

To better visualize the quality of the offer of the G20 destinations, we have plotted the quality index as computed above with respect to the size of the offer for each destination, while also taking into account the popularity of each destination: in the graphs below, the X-axis represents the number of establishments for each category divided by the number of yearly overnights for each location, while the Y-axis represents the quality index computed for that category. Data for overnights comes from the Italian National Institute of Statistics (ISTAT) and refer to the year 2018. Fig. 1 refers to restaurant facilities; fig. 2 to accommodations; fig. 3 to attractions, and fig. 4 to the overall offer.

Fig. 1 – Quality/size plot for restaurants in G20 destinations

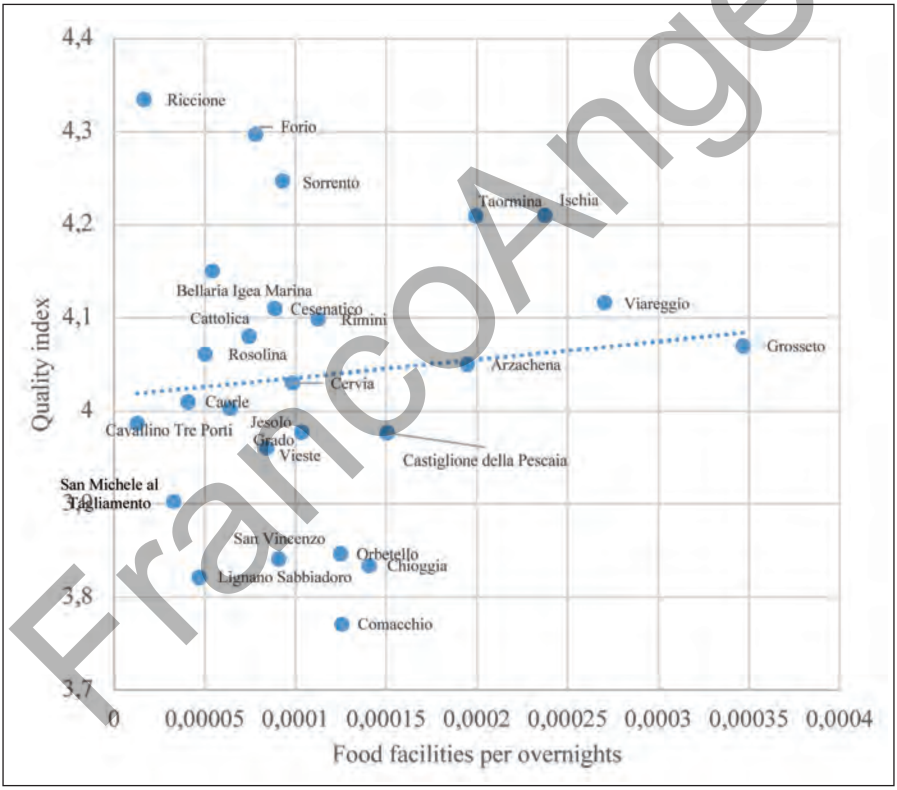


Fig. 2 – Quality/size plot for accommodations in G20 destinations

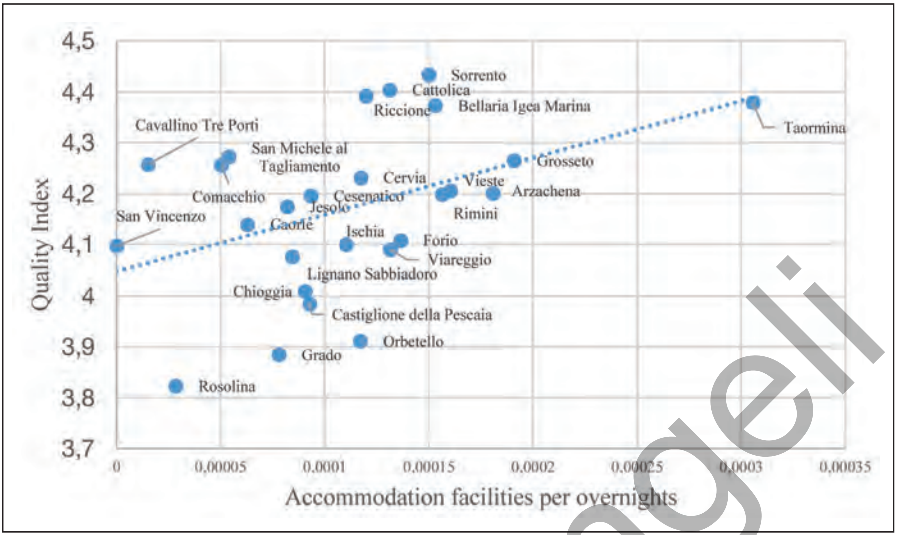


Fig. 3 – Quality/size plot for attractions in G20 destinations

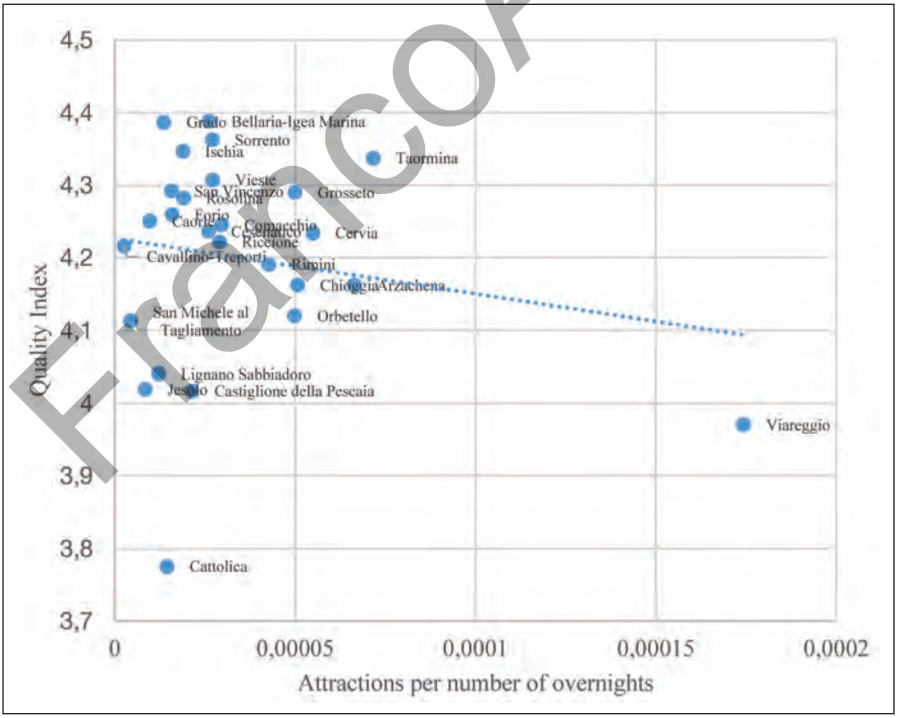
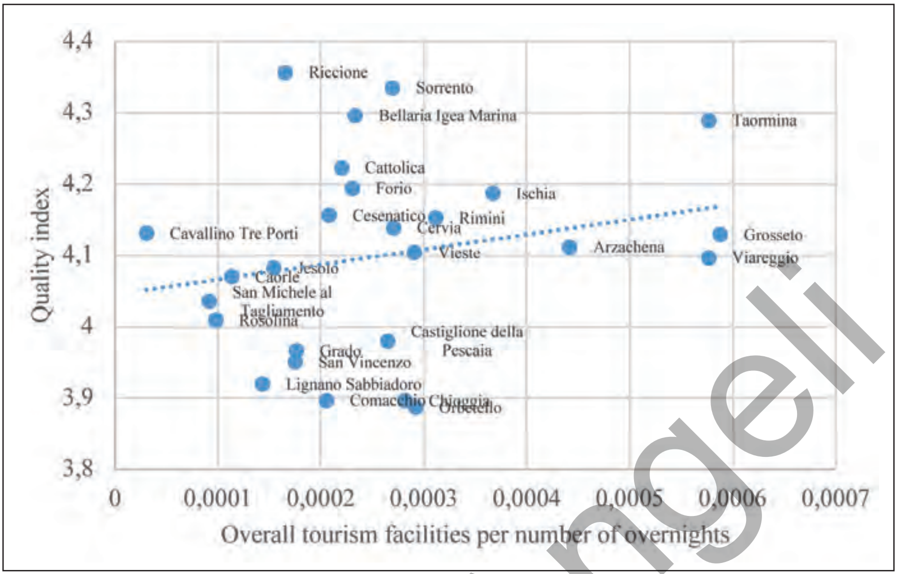


Fig. 4 – Quality/size plot for the overall offer of G20 destinations



4. Findings

Restaurants: Looking at fig. 1, in terms of the number of restaurants over overnight stays we observe how most destinations are located between 0 and 0.00015, with only a few outliers above 0.00020: Ischia, Viareggio and most notably Grosseto, which registers a X-value close to 0.00035. Notably, it's Tuscan destinations (Grosseto, Viareggio, Castiglione della Pescaia) and island destinations (Ischia, Taormina and Arzachena) that lie well above the average, whereas most North Adriatic destinations clock around the average and below. Looking at the Y-axis, the destinations above the mean are Southern destinations (Sorrento, Taormina, Ischia, Forio) and Emilia-Romagna destinations (Riccione, Bellaria-Igea Marina, Cesenatico, Rimini). Taking into account both dimensions, Ischia and Taormina excel both in terms of quality and quantity in their restaurant offer, and to a lesser extent, this is also true for Sorrento and Viareggio. Riccione, Forio and Bellaria-Igea Marina are notable in the quality of their restaurants which is above the mean, but their quantity is lower than similar popular destinations. Orbetello, Chioggia, Comacchio, Castiglione della Pescaia and San Vincenzo suffer from the opposite problem: the number of their restaurants is more than adequate, but they underperform in terms of quality. Most Veneto (Caorle, Rosolina, Sa Michele al

Tagliamento, Cavallino-Treporti, Jesolo) and Friuli-Venezia-Giulia (Grado, Lignano Sabbiadoro) destinations are at a deficit both in terms of quality and quantity.

Accommodations: Turning our attention towards fig. 2, most destinations have a number of accommodation overnight stays between 0.0005 and 0.002; Rosolina, Cavallino-Treporti and San Vincenzo are found below the 0.00005 threshold, whereas Taormina at around 0,00031 is the only destination well above 0.0002. Most Veneto destinations can be found below the mean value for number of accommodations over tourist nights, due to their tourism hospitality infrastructure represented by huge and luxury camping areas. Therefore, they actually present a comparatively limited number of facilities but with higher number of bed-places available in comparison with other G20 destinations. On the other hand, destinations in Central and Southern Italy have more adequate accommodation offers with respect to their popularity. Looking at the Y-axis, Sorrento, Taormina and some Emilia-Romagna destinations (Cattolica, Riccione, Bellaria-Igea Marina) are notable for their quality, while destinations in Veneto and Tuscany have quality levels well below the mean. Looking at both dimensions, once again Taormina excels both in terms of quality and quantity, and to a lesser extent this is true for Sorrento, Bellaria-Igea Marina, Cattolica and Riccione. No destination faces the problem of having high-quality but a comparatively small number of accommodation facilities, while many destinations face the opposite problem, i.e., the number of accommodation facilities is adequate but there's a quality deficit (Orbetello, Viareggio, Forio, Rimini, Vieste, Arzachena and Ischia). Once again, it's Veneto destinations (Rosolina, Caorle, Jesolo, Chioggia), together with San Vincenzo, Grado and Lignano Sabbiadoro, that are notable in that they their accommodation facilities suffer in terms of quality and quantity.

Attractions: Fig. 3 depicts the situation with respect to quality and quantity of attractions: in terms of number of attractions over presences, most G20 destination lie at X-values between 0 and 0.00006, with three destinations above 0.00006 (Viareggio, Taormina and Arzachena). In terms of Y-values the only real outlier is Cattolica, with a quality score below 3.8 (0.2 lower than the next lowest-scoring destination); overall, most Southern Italy and Emilia-Romagna destinations have quality scores above the mean, while all Veneto destinations, except from Caorle, score below the mean. Looking at both dimensions, in this graph geographic clusters are harder to locate compared to the previous two graphs, but we have three notable outliers: Taormina, Viareggio and Cattolica. Taormina is once again the most highly ranked destination in terms of both quality and quantity; Viareggio is instead in the peculiar position of being both the destination with the highest number of attractions with respect to its popularity, and the second worst in terms of perceived quality – preceded only by Cattolica, which suffers from both a quality and a quantity problem (together with Jesolo, Lignano Sabbiadoro, Castiglione della Pescaia and San Michele al Tagliamento).

Overall offer: Finally, fig. 4 provides an overview of the overall quality of a destination with respect to the number of establishments compared to the market share/popularity of the destination. Geographic clustering is easier to spot in this final graph. In terms of size, most locations lie between 0.0001 and 0.0004; only Taormina, Grosseto and Viareggio have X-values above 0.0004, while only Cavallino-Treporti, San Michele al Tagliamento and Rosolina are below 0.0001. As for Y-axis values, no actual outlier can be detected, and all destinations are spread somewhere between 3.9 and 4.4; destinations in Veneto and Friuli-Venezia-Giulia lie below the mean, while destinations in Emilia-Romagna and Southern Italy lie around or above the mean. Looking at both dimensions together, as expected from the results of the previous graphs Taormina leads in terms of perceived quality and quantity. Taormina is followed by other Southern Italy destinations (Ischia and Sorrento), as well as some Emilia-Romagna destinations (Bellaria-Igea Marina, Rimini, Cervia and Cattolica). In terms of the overall tourism offer, Riccione and Cavallino-Treporti are perceived to be high-quality destinations, also denoted by a pretty higher yearly occupancy rate (27% and 24%). Orbetello, Chioggia and Castiglione della Pescaia are notable to be suffering from the opposite problem: the size of their overall offer is more than adequate given the demand, but their offer is perceived to be of lesser quality compared to the rest of the G20. In the low-quality and low-quantity quadrant we find all Venetian destinations except one (Chioggia, which doesn't score much better in terms of quantity of the touristic offer), together with San Vincenzo and the two Friuli-Venezia-Giulia destinations (Lignano Sabbiadoro and Grado).

5. Discussion

In order to understand which features and elements differentiate between the perception of destinations of higher quality, from those whose image is perceived of as being of lower quality, in terms of their tourism offer, we analyzed the tourism sub-systems of more competitive and the less attractive destinations. This was done in terms of the online reputation, or the perceived quality of restaurants, accommodations and attractions.

The results of the study describe the G20S restaurants as a medium-range offer (€€-€€€), which is 58% of the whole offer, characterized by a marked "Italian" type of cuisine (80,3%): pizza (26,1%), seafood (29,6%) and Mediterranean (6,9%). The Med cuisine seems to be the most appreciated by the public with an average score of between 4.08/5.00. The restaurants' offer in destinations with a higher ranking are fairly homogeneous and it is possible to summarize them as follows:

– medium range price (€€-€€€) restaurants, which form the majority, with total ratings above the average (4.02/5.00);
– concerning the cuisine type it can be noted that destinations located in Southern Italy, famous for their typical Mediterranean food, have a higher perceived quality, with a rating above the G20S average.

The destinations whose restaurant's ratings are the lowest in terms of quality highlight the following critical issues:

– they are located in Northern and Central Italy;
– presence of medium price range (€€-€€€) restaurants, which are the majority of all the types of restaurants, with total ratings below the G20S average (which is 4.02/5.00);
– cheap (€) restaurants are generally the ones with higher ratings when compared to medium range price restaurants;
– concerning the type of cuisine, the majority of the less appreciated food facility destinations are seafood restaurants which score above the G20S average, but with ratings lower than the standard. Some of these destinations (Chioggia, Comacchio and Orbetello) are renowned traditional destinations for seafood, but the related ratings show that the image of these destinations does not correspond to a top reputation in terms of quality.

The accommodation sector of Italian coastal destinations is mainly represented by the extra-hotel sector (23,1% B&Bs, 24,6% short rent accommodations), while the hotel sector is 37,1% of the whole offer. The former appears to be more appreciated by the public in terms of quality, the latter records a lower rating when compared to the extra-hotel sector; the 4 and 5-star hotels score the best satisfaction ratings, 4.11/5.00 and 4,29/5.00 respectively. The accommodation offer of the destinations with a higher index presents the following characteristics:

– they are located in the North and South of Italy; the former have a predominant offer based on hotels, the latter on extra-hotels;
– in the south of Italy, B&B accommodation is the most popular and accounts for between 42,6% and 38,5% of the whole offer, with overall satisfaction being high. Furthermore, the hotel offer is characterized by a medium-high range, and a number of 4- and 5-star hotels exceed G20S standards, with the luxury sector achieving very high satisfaction scores (over 4.5/5.00);

- the Northern destinations present an offer typical of hotels, respectively 58,7%, 74,3% and 66,9%, of medium-medium high range (Cattolica) or medium-medium low range (Bellaria-Igea Marina and Riccione).

Accommodations in destinations that recorded the lowest quality in terms of ratings reveal the following points:
- they are located in Northern and Central Italy;
- a predominance of extra-hotel accommodation, except for Grado where the offer of hotels and extra-hotels is balanced (40% vs 42%);
- a lower performance in terms of perceived quality marked hotels compared to extra-hotel accommodation;
- the perceived quality of the majority of 3 or 4-star hotels was below the G20S standards;
- ratings are above or on the average of G20S destinations for in 1 and 2-star hotels;
- considering that they are all ageing destinations, we can assume that most of the accommodations, particularly the hotel sector, needs to improve the quality of its services, as well as renovating the structure and refurbishing the furniture, as the majority of the hotels were built during the 60's-70's.

The Italian coastal destinations' offer is predominantly based on the "sea&sun" model and the main motivation to visit is related to the sea and the beaches (48%), the nature and landscapes (3%) and the cultural heritage and sport activities (1%) (Simeoni *et al.*, 2017). The results of this study highlight the importance of a high quality and diverse offer as part of the success of a destination. The destinations with the best quality ratings in terms of attractions provide us with the following characteristics:
- they are located in Southern and Northern Italy;
- they have high-quality and numerous cultural attractions (museums and churches) in the south of Italy, with an average total rating around 4.20/5.00;
- sites of interest have an average performance that exceeds G20S standards;
- the beaches, when considered as part of the attractions of the locality, perform well in terms of satisfaction, above the average of G20S (4.00/5.00);

The destinations with the lowest quality in terms of how their attractions are rated present the following characteristics:
- they are located in Southern and Central Italy;
- barring Viareggio, the beaches are generally not perceived as attractions which therefore results in a total rating of 3.39/5.00, the lowest score in terms of perceived quality among the G20S destinations;

– in the North of Italy, the offer is mainly based on *sea&sun* and the majority of destinations have a lack of cultural offerings, while the quality of amusement parks is lower than other G20S destinations.

Conclusions and Limitations

As previously mentioned, the aim of this study is to provide a method to measure the competitiveness of Italian seaside destinations, both at individual level and as a group of destinations, through the assessment of the image and reputation of tourist destinations on the web. The indexes allow us to have an insight into the performance of the main Italian coastal destinations and analyze the characteristics of the highest and lowest quality destinations and draw attention to their features and performance. The results reveal several disparities among G20 destinations in terms of overall perceived quality and, regarding individual destination characteristics, some of them need to be taken into account by destination managers as it happens that:

– high perceived quality features are sometimes not properly valorized within the offer and the brand of the destination. For instance, in seaside destination of Tuscany, the inland cuisine should be promoted more and included in the brand-building process of the destination, as it is rated by customers with higher scores than seafood restaurants;
– assets or facilities that should be the distinctive characteristic of a destination and core element of the brand are actually rated with low scores by customers, such as Chioggia, Comacchio and Orbetello, which are supposed to be famous for the renowned quality of their seafood restaurants;
– restaurants and accommodation standards – 3-4 stars hotels in particular – differ from Northern destinations to Southern ones.

Furthermore, taking into account the G20S top destinations for the number of annual overnights (2019), we notice that a large number of overnights do not correspond to being perceived of as high quality, as is expected from the indicators. In fact, as showed in fig. 4, the quality of the overall offer of tourism facilities (attractions and accommodations) in the most visited destinations is below the average. Conversely, destinations with a smaller number of visitors show a higher satisfaction rating among tourists, and a much larger overall tourism offer. In particular, we can argue that the restaurants sector (fig. 1) seems to be the weakest point for the most visited destinations, whose quality and quantity are all below the average. From this, we can argue that the top coastal destinations in Italy in terms of the number of visitors are not the top in terms of perceived quality and the number of tourism facilities. The present method has been developed as a complementary tool to official statistics and data, as it provides an in-depth analysis of the most popular Italian seaside destinations both individually and on the whole. Official statistical sources (ISTAT, WTO, TCI, etc.) collect data on arrivals and overnights, bed capacity, occupation rate, incomes generated by tourists, country or region of origin of the tourists. The lack of qualitative data in official statistics makes it difficult for destination managers and decision makers to understand what their customers need and think. The result of this research can support any qualitative assessment and monitoring of a destination, backing up official statistics or calling them in question.

As the results of this study show, seaside destinations are not homogeneous: some are traditional coastal destinations, mainly based on the *sea&sun* product, while others present a wider variety and differentiation of the offer, with a considerable presence of cultural, gastronomic or natural elements of the overall product of the destination. The results of this research, as previously said, show a geography of the destinations of excellence that differs from the one described by official statistics, based on the annual number of visitors and not on visitors' feeling or opinion (soft data). The soft data generated by web users provide insights and an analysis of the destination through the identification of strengths and weaknesses by comparing it with other destinations, and the analysis and identification of the most appreciated features in a top destination.

The co-creation process represents a new paradigm for marketing and innovation, as it empowers individuals to collaborate as a valuable resource in processes traditionally performed by the company. In these terms, reviewers' contributions can help shape a new identity for the destination, by highlighting little known elements of excellence and quality. Furthermore, monitoring the guests' experiences, as we have done in this study, is a crucial action for the competitiveness of a destination. This paper considers TripAdvisor ratings at face value, without any attempt to assess their authenticity. It is however possible that a portion of TripAdvisor reviews are fictitious, or maliciously left to undermine the competition, as it is known to happen[3]. According to TripAdvisor itself, only 2.1% of all reviews are fake and most are successfully screened (TripAdvisor data, 2019), but according to a British consumer organiza-

[3] Cfr.: Sterling G., "TripAdvisor says it blocked or removed nearly 1.5 million fake reviews in 2018". *Search Engine Land*, Sept. 20th 2019. Available at: https://searchengineland.com/tripadvisor-says-it-blocked-or-removed-nearly-1-5-million-fake-reviews-in-2018-322401.

tion, one review out of 7 is a possible fake[4]. This lack of transparency and the existence of a number of fictitious reviews imply that our results might have been distorted in ways that are beyond our control. Future studies should explore the authenticity of TripAdvisor ratings, and work on finding ways to distinguish between genuine and deceptive ratings.

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[4] Cfr.: "TripAdvisor is failing to stop fake hotel reviews, says Which". *The Guardian*, Sept. 6th 2019. Available at: www.theguardian.com/travel/2019/sep/06/tripadvisor-failing-to-stop-fake-hotel-reviews-which.

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