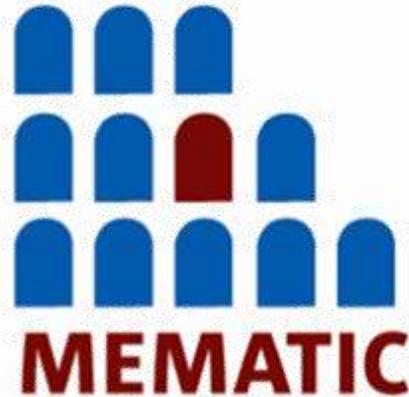




**TOR VERGATA**  
UNIVERSITÀ DEGLI STUDI DI ROMA



**MASTER  
IN ECONOMIA  
E MANAGEMENT  
DELLE ATTIVITÀ  
TURISTICHE  
E CULTURALI**

# “Designing and Managing the Digital Transformation in the Tourism Sector”

# Introduction

In this lesson we will talk about how the tourism sector is increasingly influenced by the use of digital technologies, how digital is changing our life model and we will focus on the new "tourist figure" that is emerging.

## ABOUT FTO

# MISSION

We express the voice of our Associates towards Institutions, Industry and Consumers, guaranteeing an authoritative territorial presence. We ensure continuous competence in the definition and management of employment contracts, we provide qualified consultancy and highly specialized training.

We want to be the reference point of every Company that deals with Tourism and we want to build solid and lasting links between the Company and the Final Consumer.

# VISION



**TOR VERGATA**  
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**MEMATIC**  
MASTER  
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TURISTICHE  
E CULTURALI

**OUR MEMBERS**





## DIGITAL AS NEW LIFE MODEL

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**Best service ever.  
I recommend it!**



## ONLINE REPUTATION

97% of travelers share their travel experiences on social media.

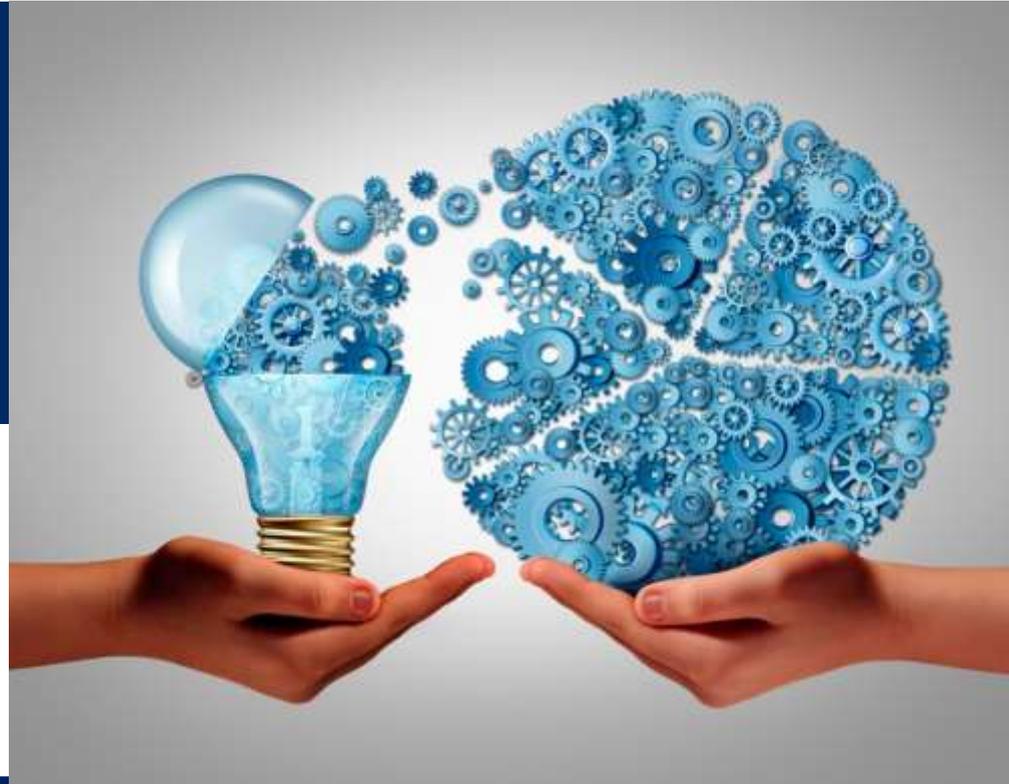
In the last year, reviews on accommodation on Google have grown by + 208%.

84% of travelers consult up to 20 reviews at the planning stage of a Travel

## DIGITAL INNOVATION, WHICH OPPORTUNITIES?

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- Increase the involvement of local people and communities;
- Achieve intelligent and equitable management of resources;
- Increase more satisfactory services to new requests;
- Review and implement business strategies



# DIGITAL BEHAVIORS

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## MOBILE



# DIGITAL BEHAVIORS

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It turned out that our attention span is just 9 seconds, a second more than goldfish.



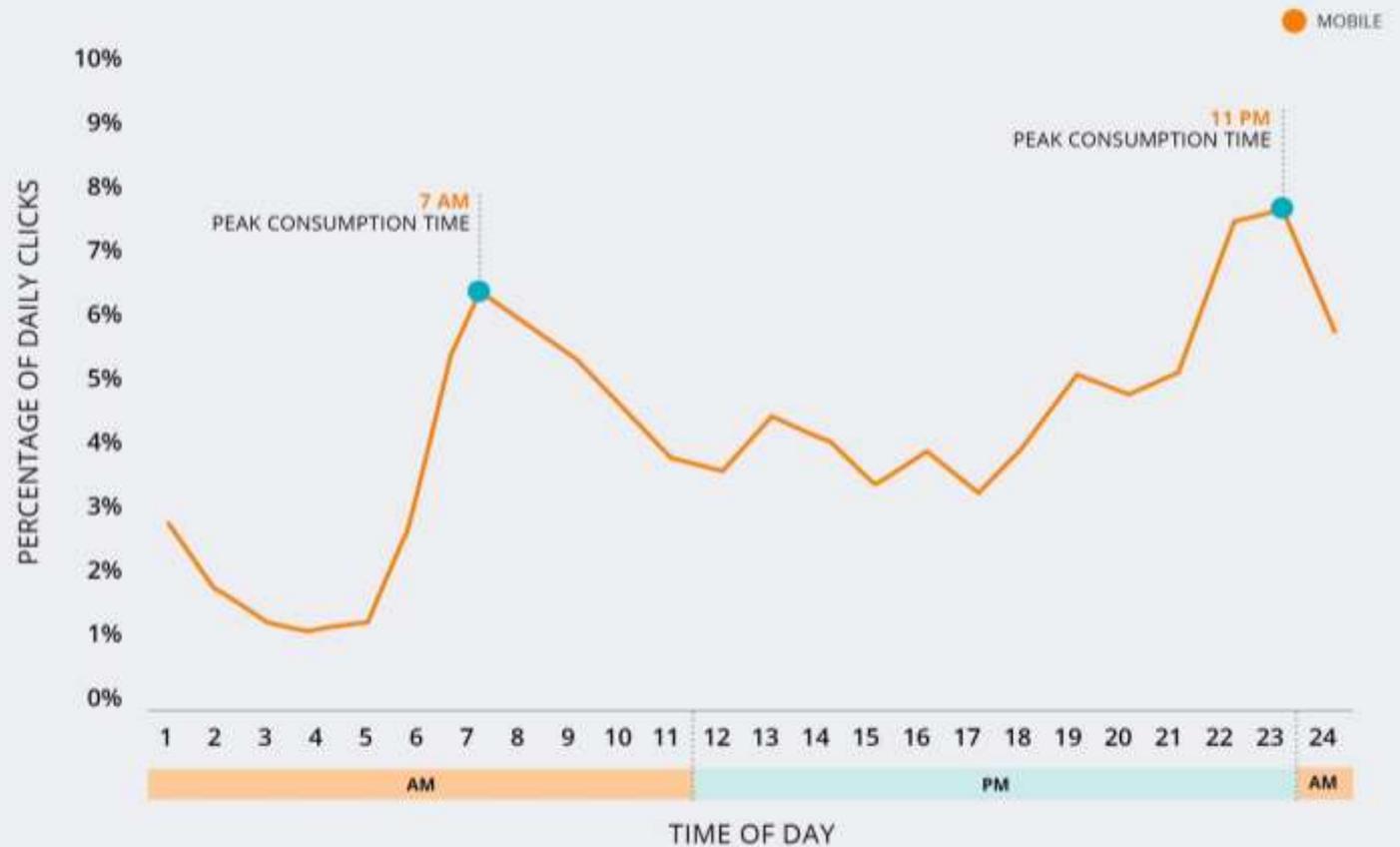
## DIGITAL BEHAVIORS

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The attention economy has undergone a great change in the digital age with the rise of large social platforms. Every extra second we spend on social media is money. Google, for example, determined the algorithm of our attention: the maximum concentration time of a millennial is 9 seconds. One second more than a goldfish.



### HOURLY MOBILE CONSUMPTION OF SUMMER TRAVEL CONTENT



# THE WEIGHT OF DIGITAL IN TOURISM



# HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

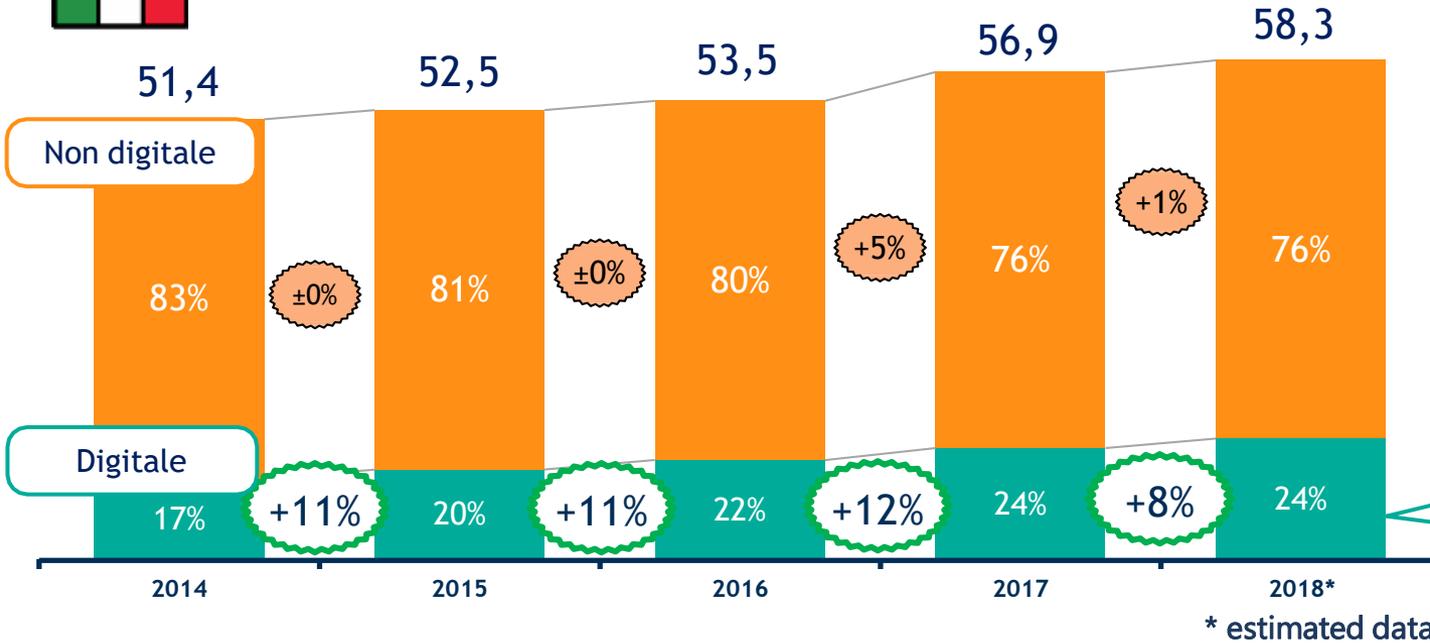
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In Italy the digital market  
grows more than the  
"traditional"

# The digital market grows more than the "traditional"

## The digital tourism market - Italy



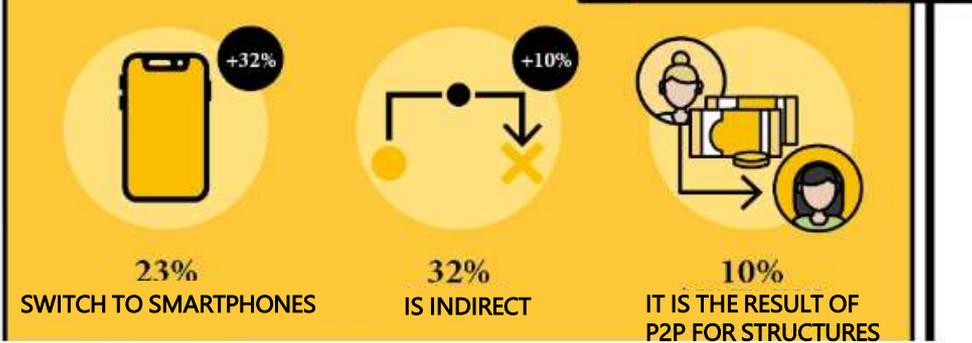
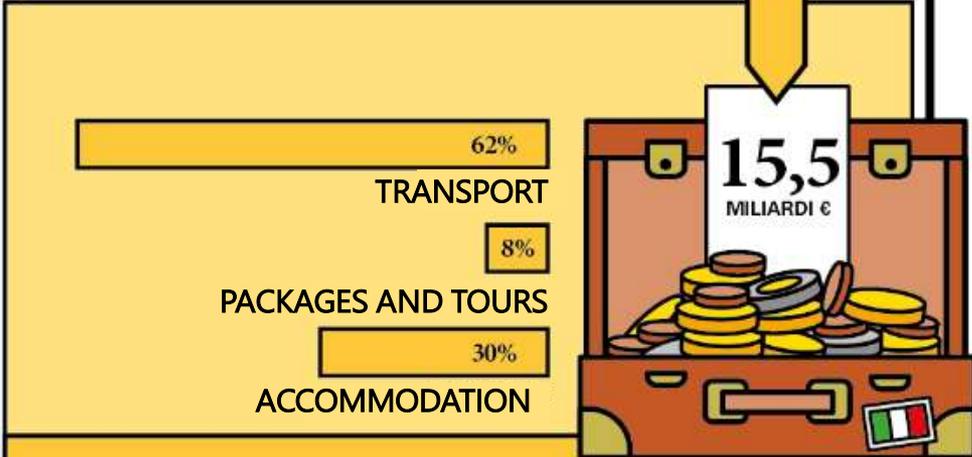
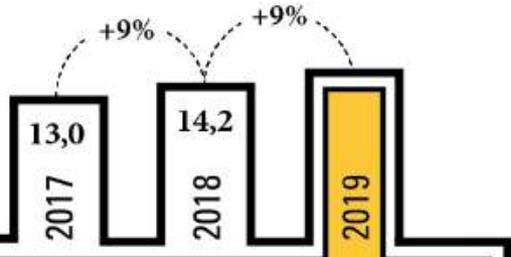
Billions of €

**DIGITAL MARKET**  
*Purchases made on sites / apps with offer in Italian.*  
(Osservatorio)

**14,2 mld€**

Note: for the years prior to 2018, the values are different from what was communicated in past editions, as calculated in the final balance

THE DIGITAL  
TRAVEL MARKET  
CONTINUES TO  
GROW



INCREASE:

From € 14.2 billion  
to € 15.5 billion

## HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

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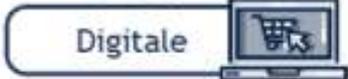
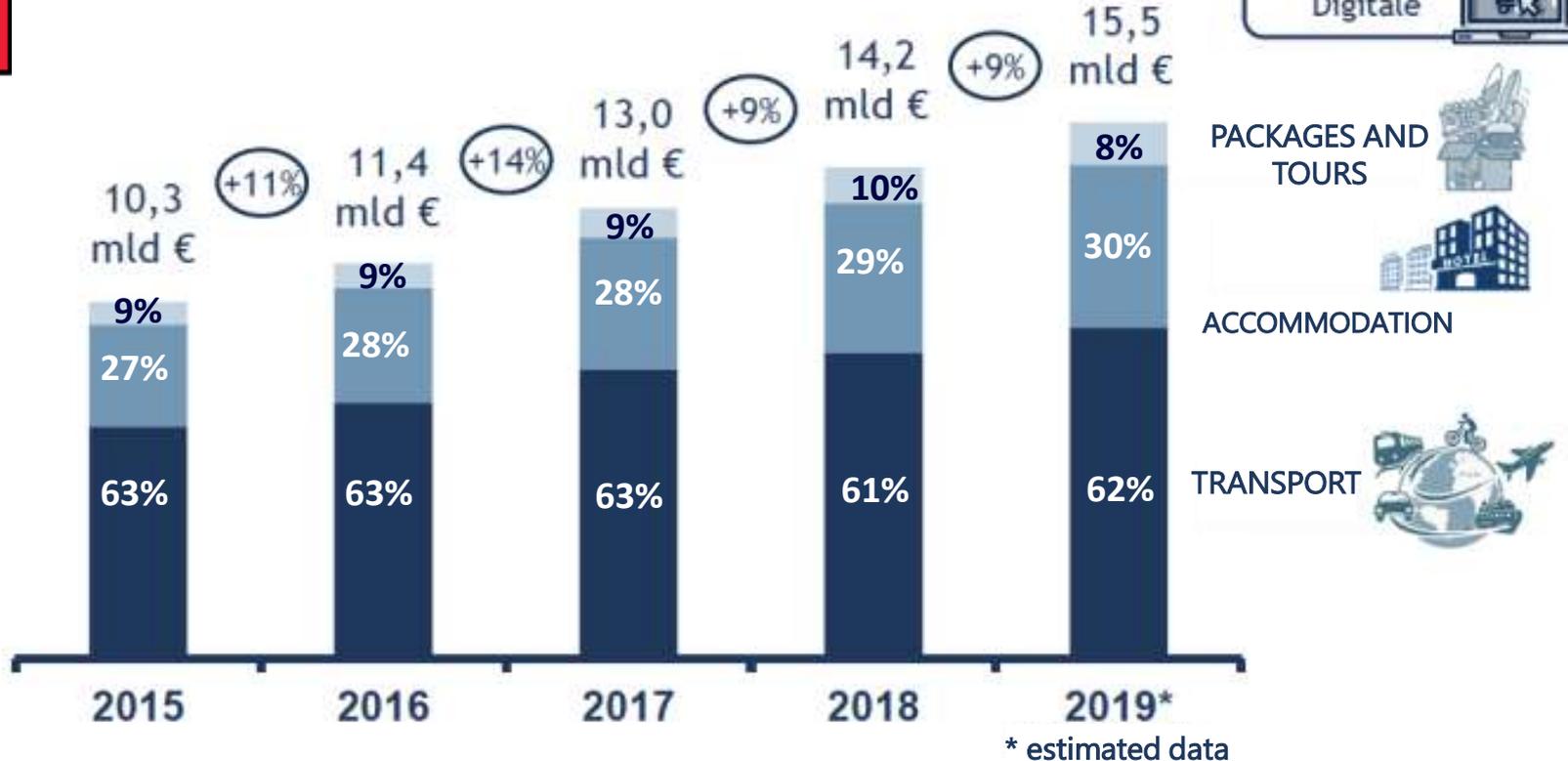


In Italy the digital market  
grows more than the  
"traditional"



Increases online shopping

# THE DIGITAL MARKET CONTINUES TO GROW

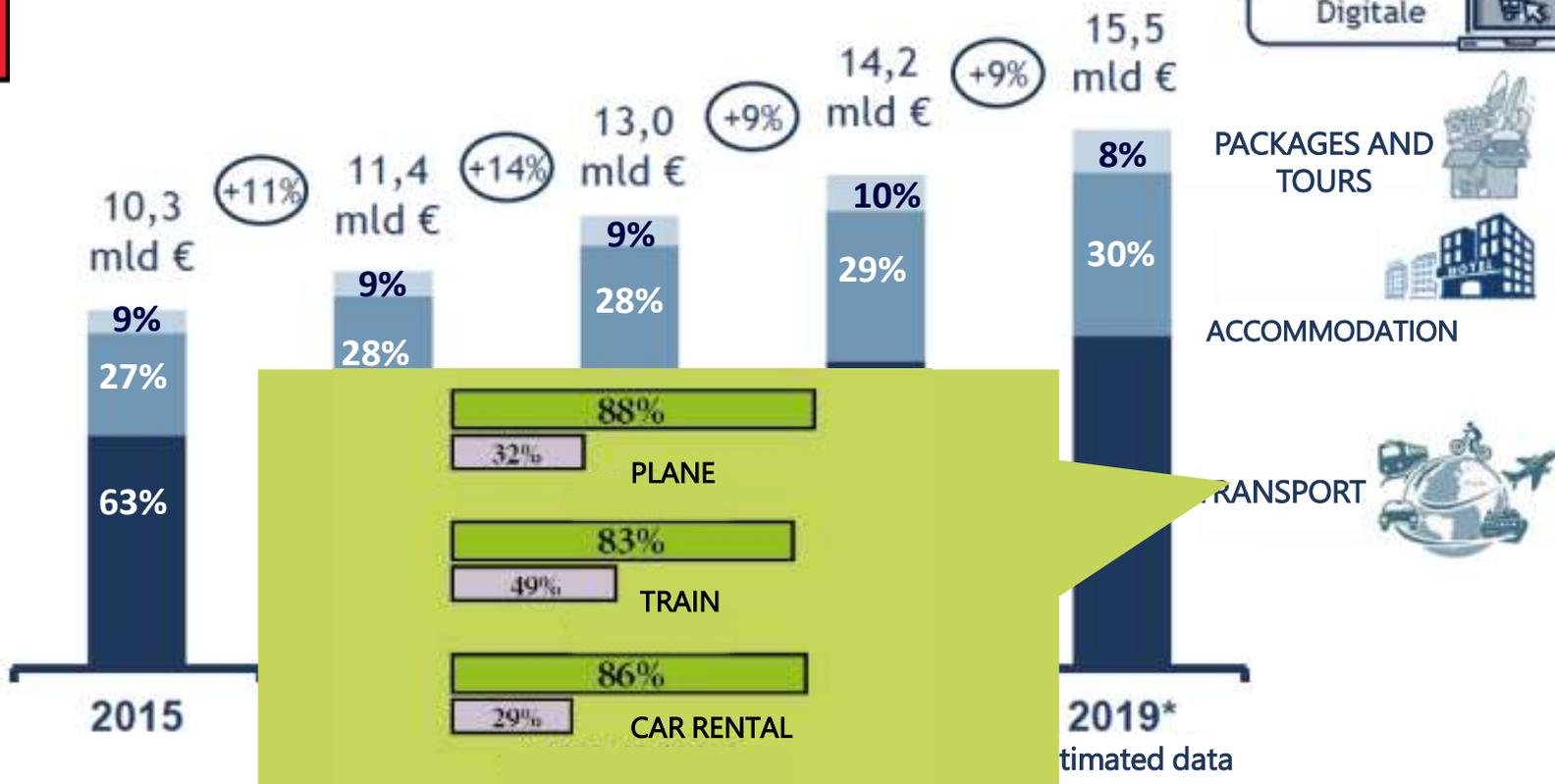


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Human & Digital: le due facce dell'innovazione nel Travel

[#OIDT19](#) [#TTG19](#) 10.10.19

# THE DIGITAL MARKET CONTINUES TO GROW



Digitale

PACKAGES AND TOURS   
ACCOMMODATION

TRANSPORT

Note: for the years prior to 2018, the values are estimated in the final balance

Human & Digital: le due facce dell'industria turistica

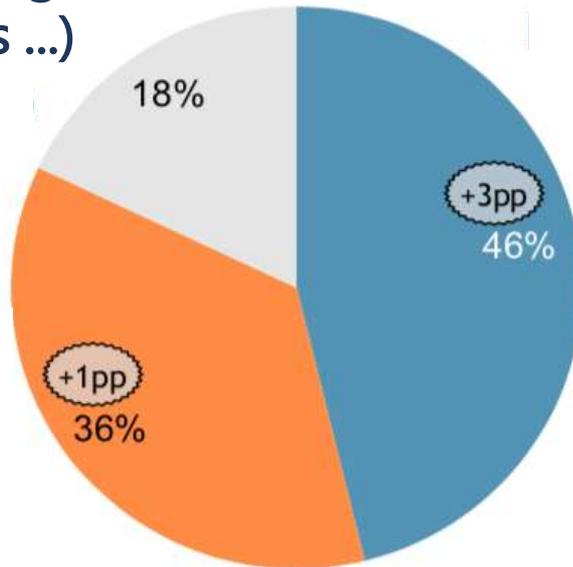
estimated in the final balance

TT19 #TTG19 10.10.19

# THE STRUCTURES ARE VERY RELIABLE ON OTA, BUT AT THE SAME TIME STRENGTHEN DIRECTLY



OTHER (agencies, coupons ...)



Through OTA or home sharing portals

Directly from the end customer



Base: 1.378 rispondenti

## HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

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In Italy the digital market  
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Increases online shopping



Direct / indirect channel

## DIRECT CHANNELS ARE STILL PREVALENT

SSERVATORI.NET digital innovation

Digitale 



Note: for the years prior to 2018, the values are different from what was communicated in past editions, as calculated in the final balance

Human & Digital: le due facce dell'innovazione nel Travel

 #OIDT19

 #TTG19

10.10.19

# HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

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In Italy the digital market grows more than the "traditional"



Type of device used



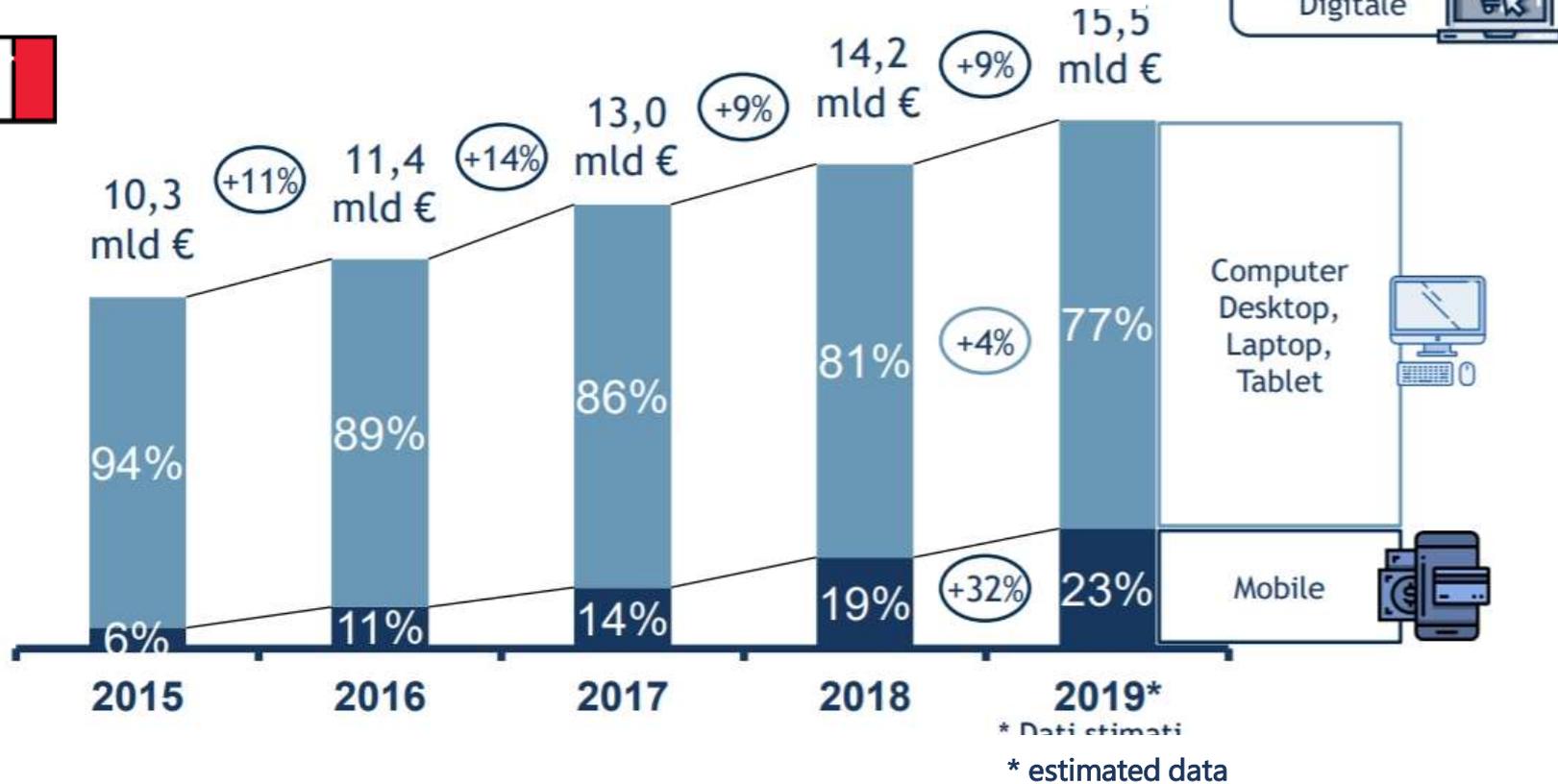
Increases online shopping



Direct / indirect channel



# THE USE OF THE PC PREVAILS BUT THE SMARTPHONE RUNS



Note: for the years prior to 2018, the values are different from what was communicated in past editions, as calculated in the final balance



## HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

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In Italy the digital market grows more than the "traditional"



Increases online shopping



Direct / indirect channel



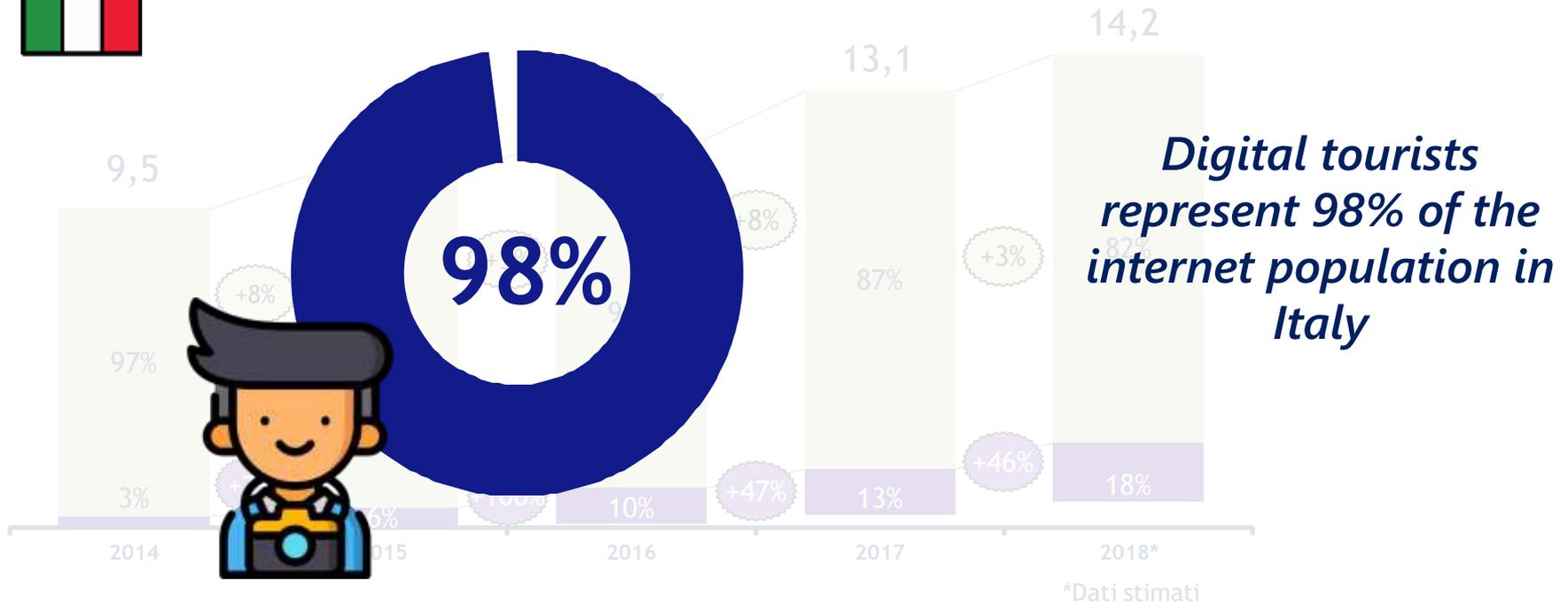
Type of device used



Representation in Italy

# The tourist is digital

## Il mercato digitale del Turismo: tipologia di device



Nota: per gli anni precedenti al 2018 i valori risultano differenti da quanto comunicato nelle passate edizioni, in quanto calcolati a consuntivo

# HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

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Increases online shopping



Direct / indirect channel



Type of device used

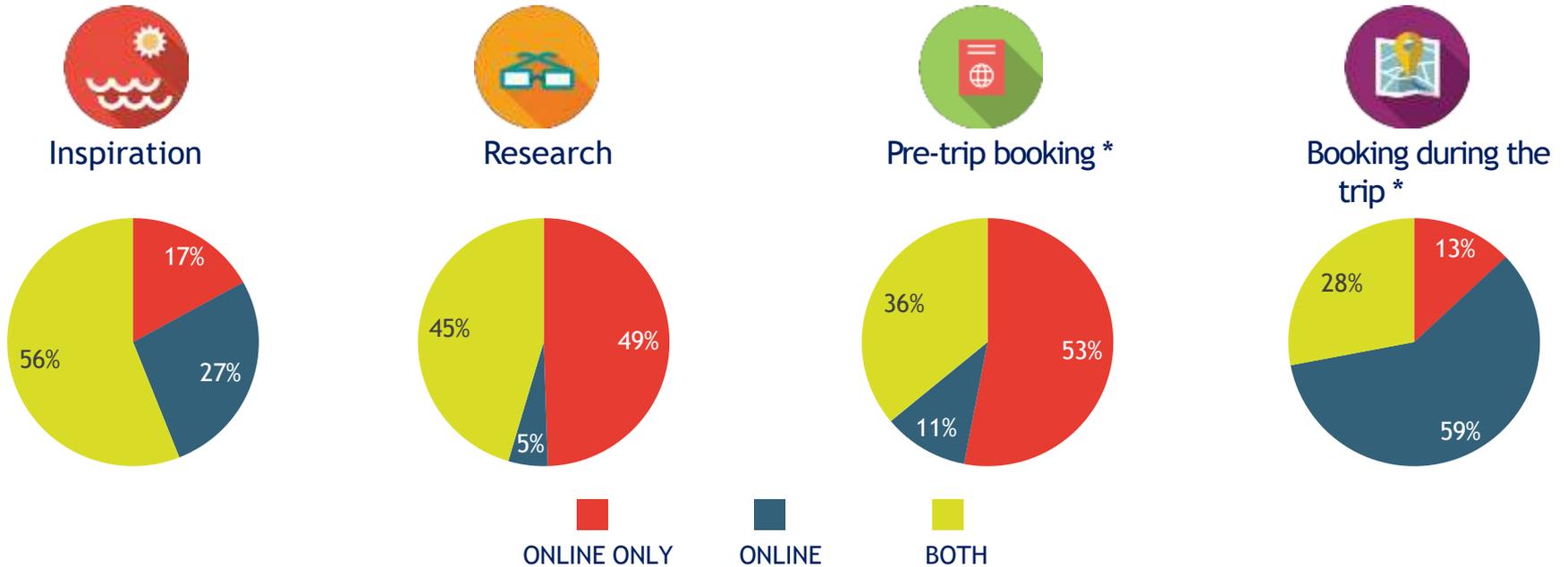


Representation in Italy



Digital Tourist Journey:  
Inspiration - research - booking

# ... and how much "zapping" between online and offline!



*There are no prevalent paths, up to 3 different types of tools are used for inspiration and 4 for research*

\* At least one product (main or secondary)

Base: Digital tourists who carried out the activity **Doxa**

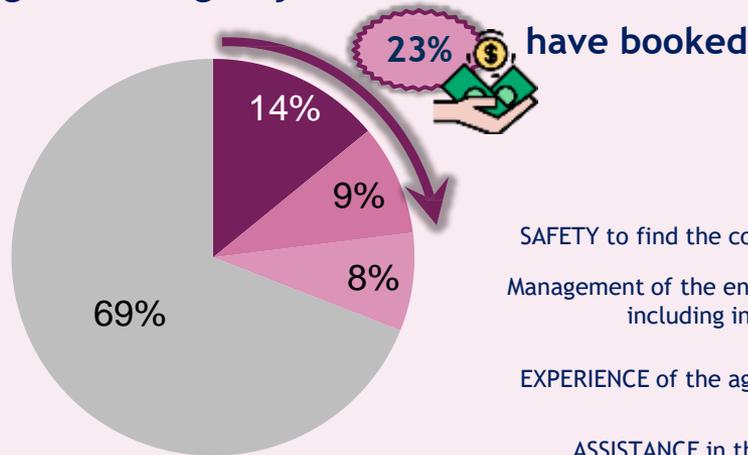
# EXPERIENCE, A HOLISTIC CONCEPT



## Digital tourists who go to the agency



- Yes, to book the holiday, after looking for information online
- Yes, to find information and book
- Yes, just to find information
- No, all online independently



## Main reasons



Base: 624 digital tourists (long vacation)

# HOW TO IDENTIFY THE ONLINE TOURIST FLOW?

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Type of device used



Increase online shopping



Representation in Italy



Direct / indirect channel

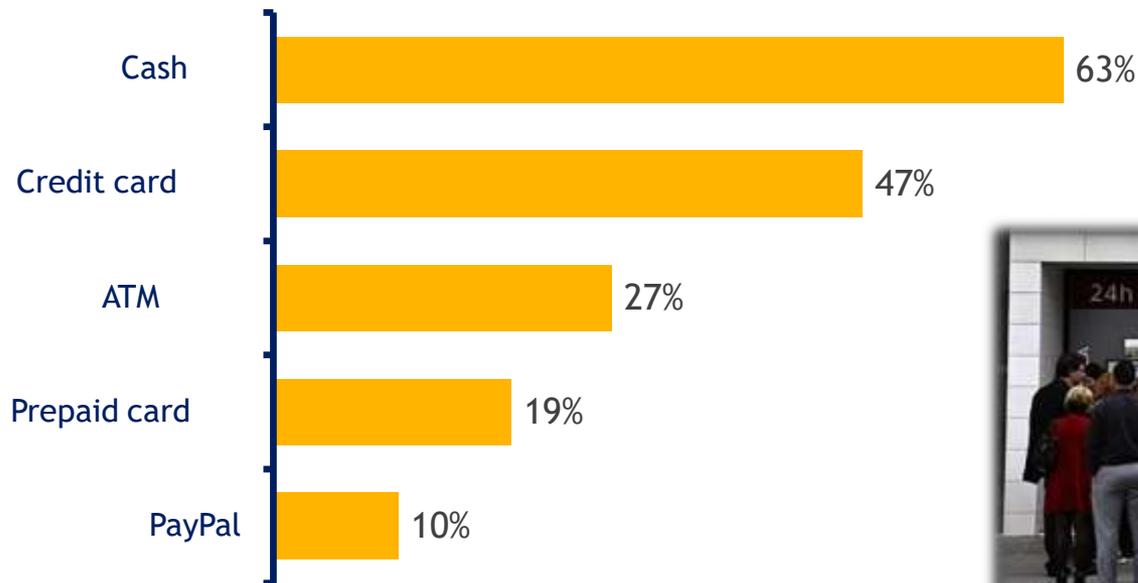


Digital Tourist Journey:  
Inspiration - research - booking



Digital payments

## The tourist flow is also captured ... with digital payments

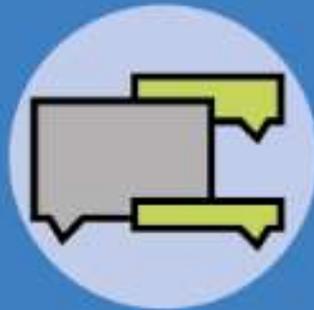


## THE INNOVATIVE SOLUTIONS USED WHEN TRAVELING



23%

Online check-in for  
accommodation or flight  
(on site or at kiosks)



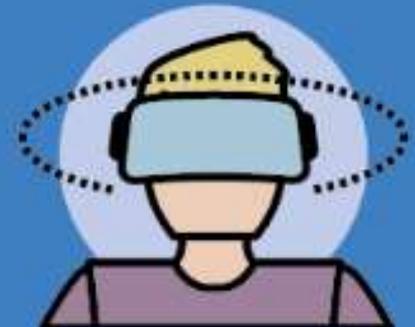
13%

Chat



6%

Smartphone key for  
bedroom door



6%

Augmented or virtual  
reality for additional  
content





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