



# Emilia-Romagna TOURISM OBSERVATORY

## *PARATOUR Project CONFERENCE*



*Nicosia - Cyprus, 20<sup>th</sup> September 2008*

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Unioncamere Emilia-Romagna è stata invitata alla Conferenza sugli osservatori turistici - Nicosia, Cipro, 20-21 settembre 2008 - organizzata dal Consorzio internazionale per lo sviluppo dell'Osservatorio turistico cipriota, nell'ambito del progetto Paratour, per presentare come caso di best-practice l'Osservatorio turistico regionale, da anni realizzato da Unioncamere e Regione Emilia-Romagna, con la collaborazione di Confcommercio e Confesercenti.

La conferenza ha consentito ai ciprioti di approfondire la conoscenza dell'Osservatorio regionale ed è stata occasione per un proficuo scambio di esperienze con altri curatori di osservatori turistici presenti provenienti da Francia, Grecia e Marocco.

Sono membri del consorzio:

The Cypriot Tourism Organisation (<http://www.visitcyprus.com/wps/portal>)

- The European University of Cyprus ([www.cycollege.ac.cy](http://www.cycollege.ac.cy))
- the Developmental Organisation TALOS ([www.talos-rtd.com](http://www.talos-rtd.com))
- Association of Tourist Enterprises of Cyprus ([www.acte.com.cy](http://www.acte.com.cy))
- the National Centre for Social Research ([www.ekke.gr](http://www.ekke.gr))
- the Enterprise for Developmental Studies ETAM ([www.etam.gr](http://www.etam.gr))

Finanzia il progetto:

Research Promotion Foundation of Cyprus (<http://crpf.metacanvas.com/EN/>)

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## Who we are, What we do

Unioncamere Emilia-Romagna is the Regional Association of the Chambers of Commerce of Emilia-Romagna: we bring together all nine Chambers of our region (Bologna, Ferrara, Forlì-Cesena, Modena, Parma, Piacenza, Ravenna, Reggio Emilia and Rimini).

Our aim is the promotion of the area's economic strength, in cooperation with all local policy-makers.

We:

- provide institutional representation of Chambers;
- coordinate the activities of the Chambers.

# Regional Scenario I

**Introducing you  
to our region:  
geography**



# Regional Scenario II

Introducing you to our region:  
social and macro-economic  
indicators

	<i>Italy</i>	<i>Emilia-Romagna</i>	<i>E.R / Italy</i>
<b><i>Population</i></b>	59.131.287	4.223.264	7,14%
<b><i>Active Businesses</i></b>	5.210.428	429.114	8,26%
<b><i>Added Value</i></b>	1.316.586	114.535	8,70%
<b><i>GDP p.c. (EUR)</i></b>	25.861,77	31.598,80	122,20%
<b><i>Activity rate (15-64)</i></b>	62,50%	72,40%	115,80%
<b><i>Unemployment rate</i></b>	6,10%	2,90%	47,54%
<b><i>Export Value (mil. EUR)</i></b>	358.633	45.898	12,80%

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***Data source: Unioncamere Emilia-Romagna Research Dept. on ISTAT and Tagliacarne Institute gross data***

# Regional Economy

The structure of our economy:  
the weight of the macro-sectors  
**ADDED VALUE**

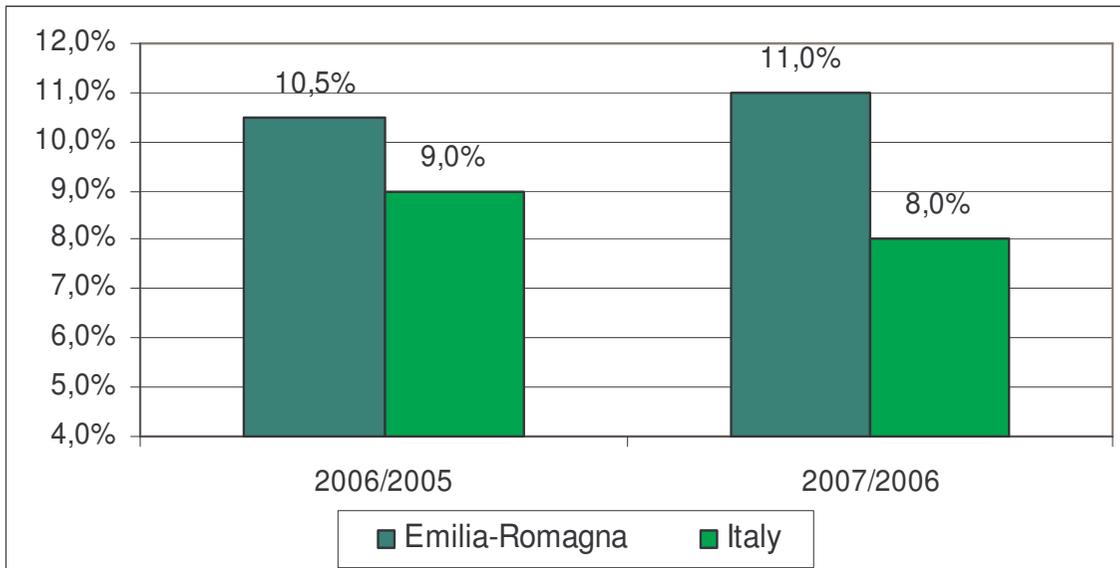
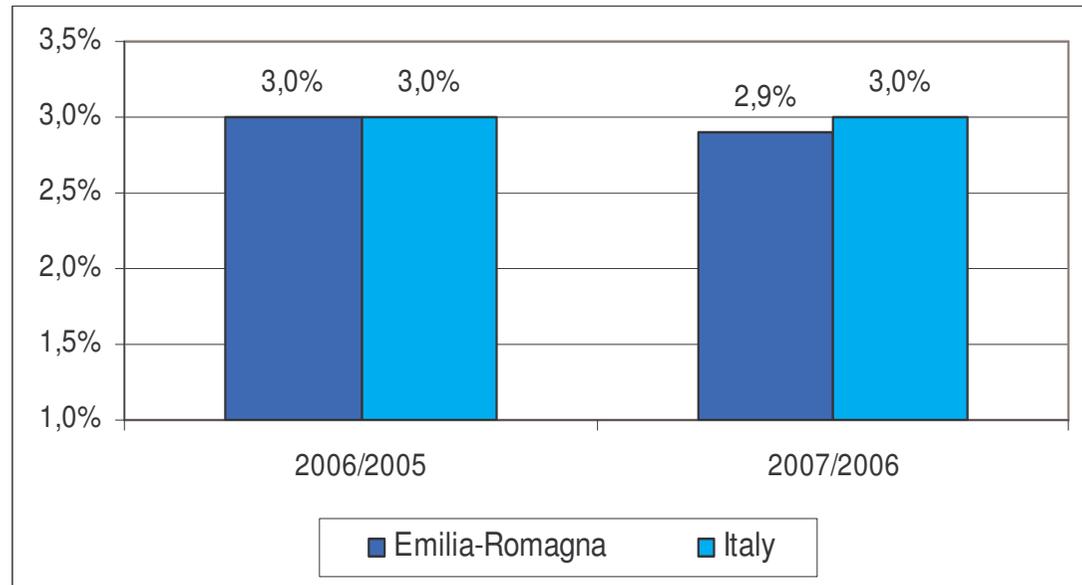
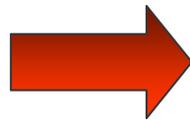
	<i>Agriculture</i>	<i>Industry</i>	<i>Services</i>	<i>Total amount</i>
<i>Emilia -Romagna (millions of Euros)</i>	2.643	37.702	74.191	114.535
<i>Emilia -Romagna (relative weight)</i>	2,3%	32,9%	64,8%	100,0%
<i>Italy (millions of Euros)</i>	27.193	349.777	939.616	1.316.586
<i>Italy (relative weight)</i>	2,1%	26,6%	71,4%	100,0%
<i>Emilia-Romagna / Italy</i>	9,7%	10,8%	7,9%	8,7%

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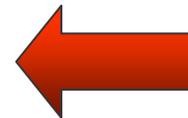
*Data source: Unioncamere Emilia-Romagna Research Dept. on Tagliacarne  
Institute gross data*

# Regional Economy

**GDP per capita growth**



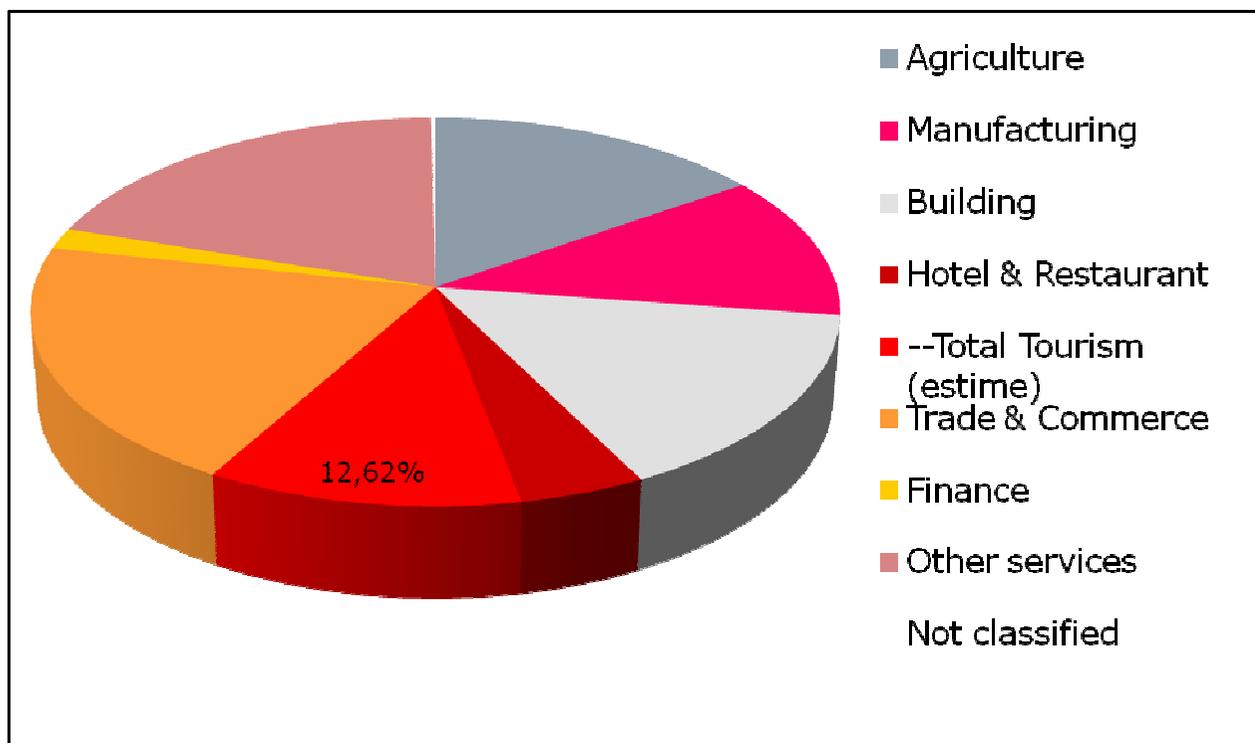
**Export growth 2007**



*Data source: Unioncamere Emilia-Romagna Research Dept. on Tagliacarne Institute and ISTAT gross data*

# Regional Economy

## THE WEIGHT OF TOURISM I the active business



Agriculture	17,20%
Manufacturing	13,53%
Building	17,13%
Hotel & Restaurant	5,06%
<i>--Total Tourism (estimate)</i>	<i>12,62%</i>
Trade & Commerce	22,70%
Finance	1,98%
Other services	22,19%
Not classified	0,21%
Grand Total	100,00%

*Data source: Unioncamere Emilia-Romagna Research Dept. on Business Register gross data*

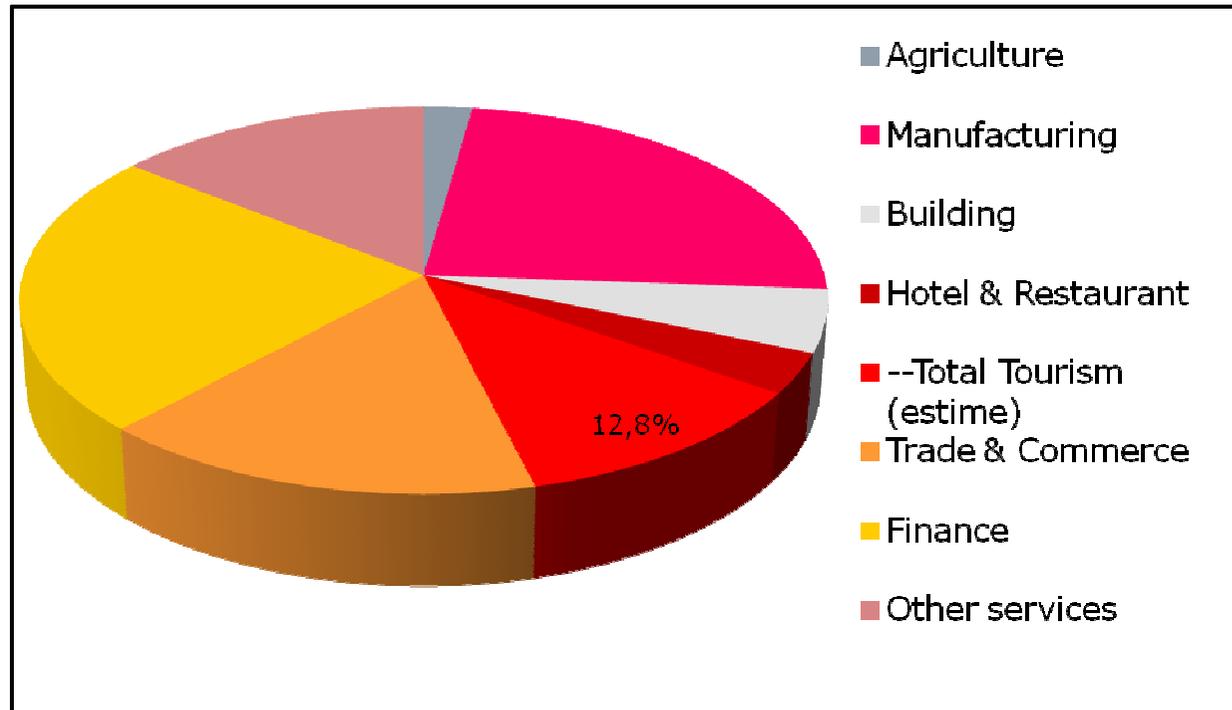
*Matteo Beghelli. PARATOUR Project CONFERENCE, Nicosia , 20<sup>th</sup> September 2008*

# Regional Economy

## THE WEIGHT OF TOURISM II

### the added value, GDP, employment

Agriculture	2,5%
Manufacturing	27,0%
Building	5,9%
Hotel & Restaurant	3,8%
<i>--Total Tourism (estimate)</i>	<i>12,8%</i>
Trade & Commerce	17,9%
Finance	26,7%
Other services	16,2%
Not classified	
Grand Total	100,00%



**The weight on Employment (11%) + the one on GDP (10%)**

*Data source: Unioncamere Emilia-Romagna Research Dept. on Business Register gross data*



# Tourism Observatory 1/13

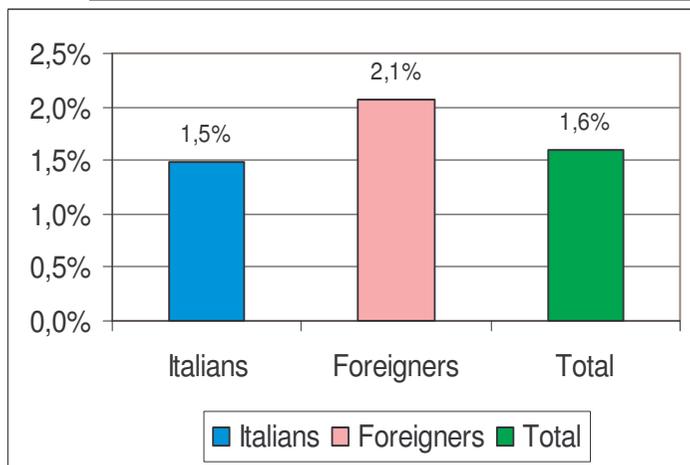
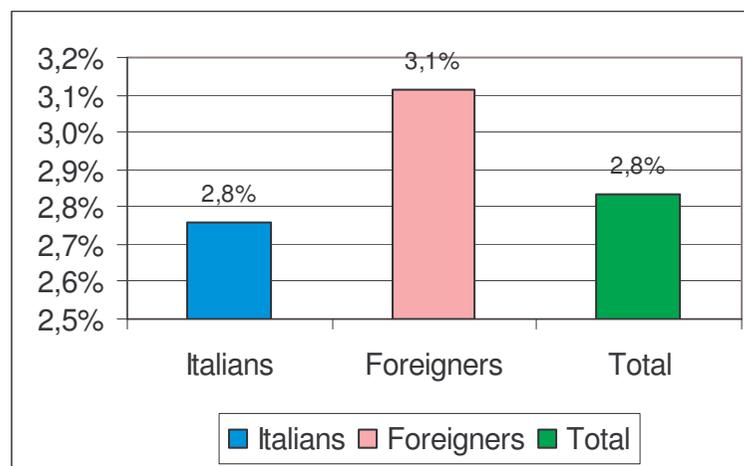
- 1) Established 12 years ago;
- 2) Partners: Emilia-Romagna regional Government and Unioncamere (due to the Regional Law 7/1998 + 2/2007 → APT 4 international promo-comm. together with product clubs: Riviera, City of Art and Business, Mountain, Spa-Health);
- 3) The aim: the analysis → the base to develop and update the co-marketing plan for the Tourism (4 "Ps" of Porter strategy);
- 4) The logic of the co-marketing plan is due to the reduction of the competition between the single businesses (hotel vs. hotel) and the increase of the competition between the various touristic destinations;
- 5) It consists of:
  - Data base up-date;
  - Annual trend analysis;
  - Structural analysis of a specific aspect (once "standard" now choose yearly in accordance with the new trend in tourism);
  - Internet site totally dedicated ([osservatorioturismo.emr.it](http://osservatorioturismo.emr.it));
  - Publication and dissemination (book, site, press, conferences).

# Tourism Observatory 2/13

## Cyclical Analysis I

### Emilia-Romagna's Riviera – Summer season 2007

<i>Arrivals</i>	2006	2007	% Var
Italians	3.698.000	3.800.000	2,8%
Foreigners	963.000	993.000	3,1%
<b>Total</b>	<b>4.661.000</b>	<b>4.793.000</b>	<b>2,8%</b>

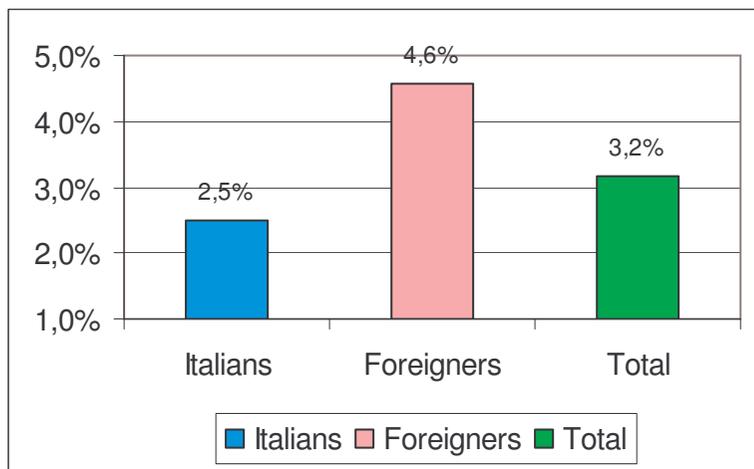


<i>Attendances</i>	2006	2007	% Var
Italians	32.447.000	32.927.000	1,5%
Foreigners	7.914.000	8.078.000	2,1%
<b>Total</b>	<b>40.361.000</b>	<b>41.005.000</b>	<b>1,6%</b>

# Tourism Observatory 3/13

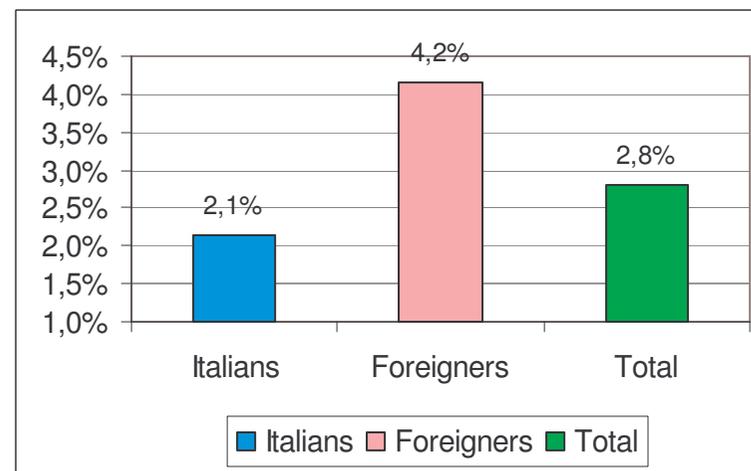
## Cyclical Analysis II

### Emilia-Romagna's towns: "Towns of art and business" 2007



<i>Arrivals</i>	2006	2007	% Var
Italians	1.486.000	1.523.000	2,5%
Foreigners	723.000	756.000	4,6%
<b>Total</b>	<b>2.209.000</b>	<b>2.279.000</b>	<b>3,2%</b>

<i>Attendances</i>	2006	2007	% Var
Italians	3.166.000	3.234.000	2,1%
Foreigners	1.518.000	1.581.000	4,2%
<b>Total</b>	<b>4.684.000</b>	<b>4.815.000</b>	<b>2,8%</b>

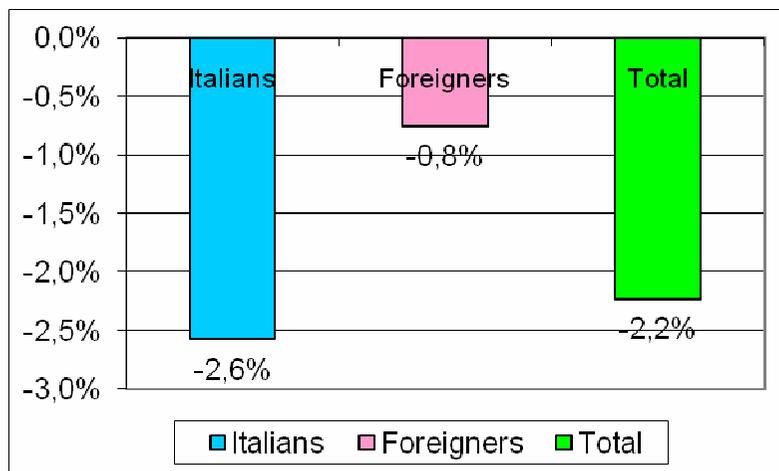
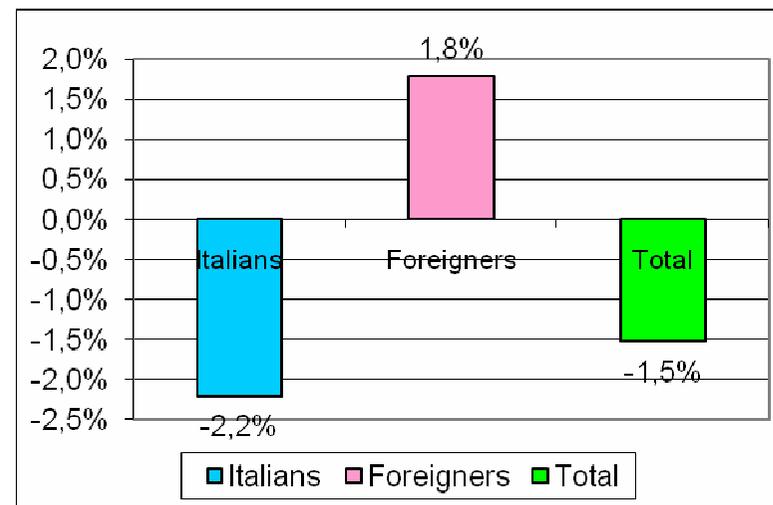


# Tourism Observatory 4/13

## Cyclical Analysis III

### Emilia-Romagna's Mountain: The Apennines 2007

<i>Arrivals</i>	2006	2007	% Var
Italians	272.000	266.000	-2,2%
Foreigners	56.000	57.000	1,8%
<b>Total</b>	<b>328.000</b>	<b>323.000</b>	<b>-1,5%</b>

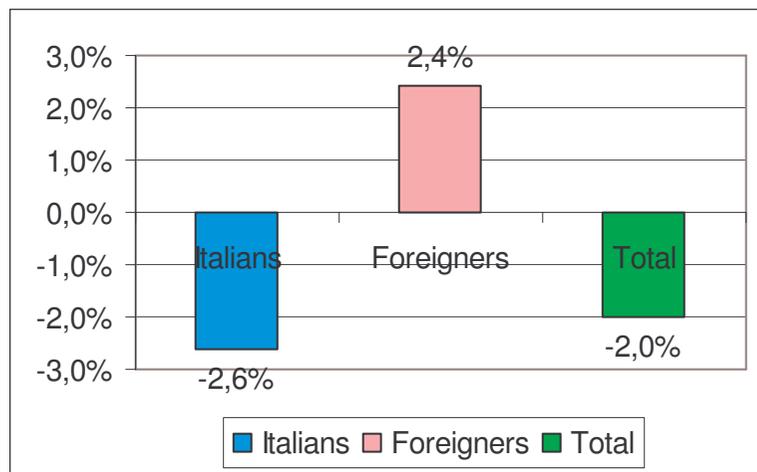


<i>Attendances</i>	2006	2007	% Var
Italians	2.253.000	2.195.000	-2,6%
Foreigners	527.000	523.000	-0,8%
<b>Total</b>	<b>2.780.000</b>	<b>2.718.000</b>	<b>-2,2%</b>

# Tourism Observatory 5/13

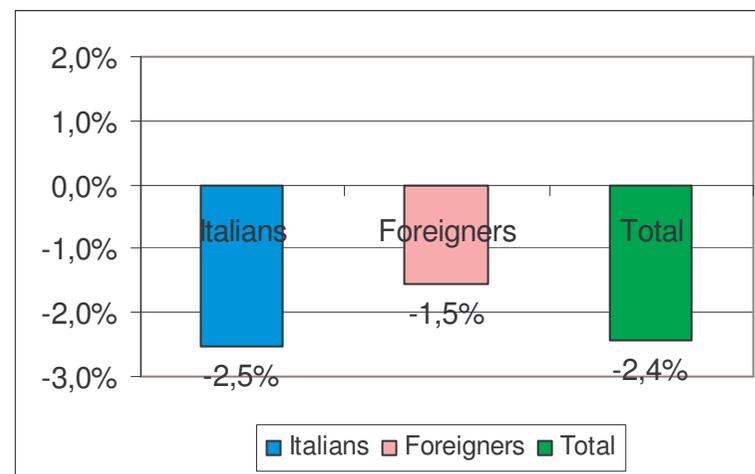
## Cyclical Analysis IV

### Emilia-Romagna's Spa: The year 2007



<i>Arrivals</i>	2006	2007	% Var
Italians	308.000	300.000	-2,6%
Foreigners	41.000	42.000	2,4%
<b>Total</b>	<b>349.000</b>	<b>342.000</b>	<b>-2,0%</b>

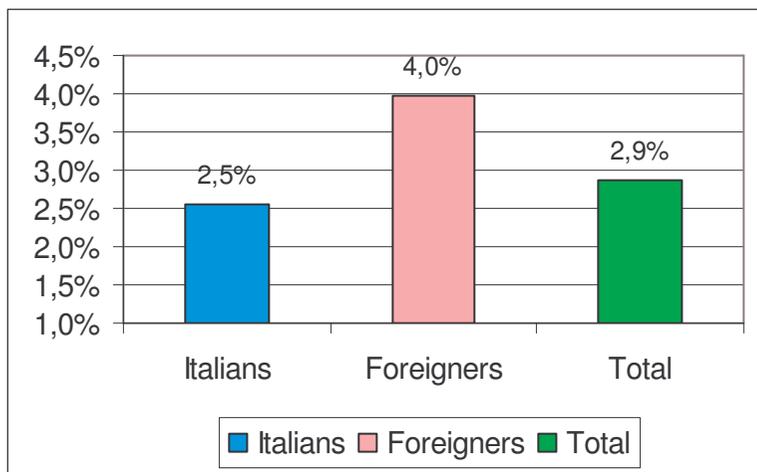
<i>Attendances</i>	2006	2007	% Var
Italians	1.708.000	1.665.000	-2,5%
Foreigners	130.000	128.000	-1,5%
<b>Total</b>	<b>1.838.000</b>	<b>1.793.000</b>	<b>-2,4%</b>



# Tourism Observatory 6/13

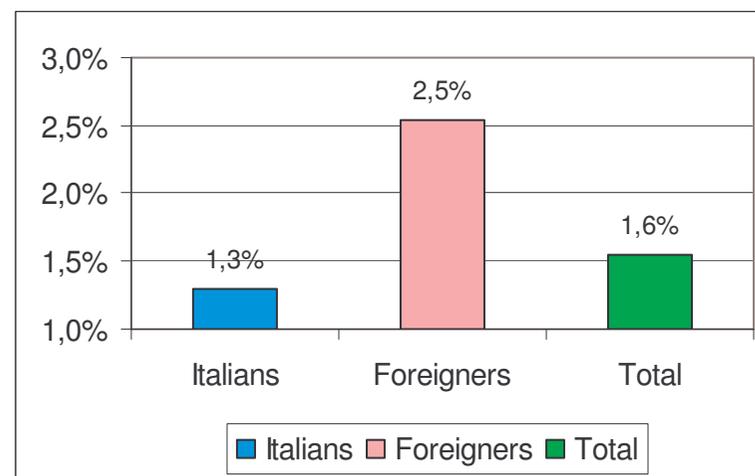
## Cyclical Analysis V

### Emilia-Romagna: the whole for the year 2007



<i>Arrivals</i>	2006	2007	% Var
Italians	6.631.000	6.800.000	2,5%
Foreigners	1.993.000	2.072.000	4,0%
Total	8.624.000	8.872.000	2,9%

<i>Attendances</i>	2006	2007	% Var
Italians	42.419.000	42.968.000	1,3%
Foreigners	11.044.000	11.325.000	2,5%
Total	53.463.000	54.293.000	1,6%



# Tourism Observatory 7/13

## Structural analysis

### Emilia-Romagna tourism and foreign demand

3.500 international tour operators had been interviewed representing the universe of the whole operators. These are the main results:

- 1) Main competitors of Italy are: France and Spain (same target group, same touristic products → Riviera, Mountain, Countryside, Spa and health, Towns of Art and Business);
- 2) 6/10 of operators selling Italy sell Emilia-Romagna → 4<sup>th</sup> region;
- 3) ER has a very good positioning as far as art and culture is concerned;
- 4) ER has a good positioning for leisure segment;
- 5) ER has a weak positioning of business segment (surprisingly) and food and wine sector (even more surprisingly);

***→ this, given the features of our economy and tourism structure, is a nonsense → it means we have to work on the perceived image of our tourism not on the effective touristic product → we know in which direction we have to work.***

# Tourism Observatory 8/13

## Let's have a look at the methodology

### 1) Analyze the supply side of the market;

- Accommodation facilities (every 5 years, let's say);
- Catalyzing events;
- General state of the territory;

### 2) Analyze the demand side of the market;

- Evolution of the demand:
  - Is there a target for us?
  - Which one?
  - How good is it? (increasing or decreasing? out-of-pocket capacity/propensity? → socio-demographic analysis);

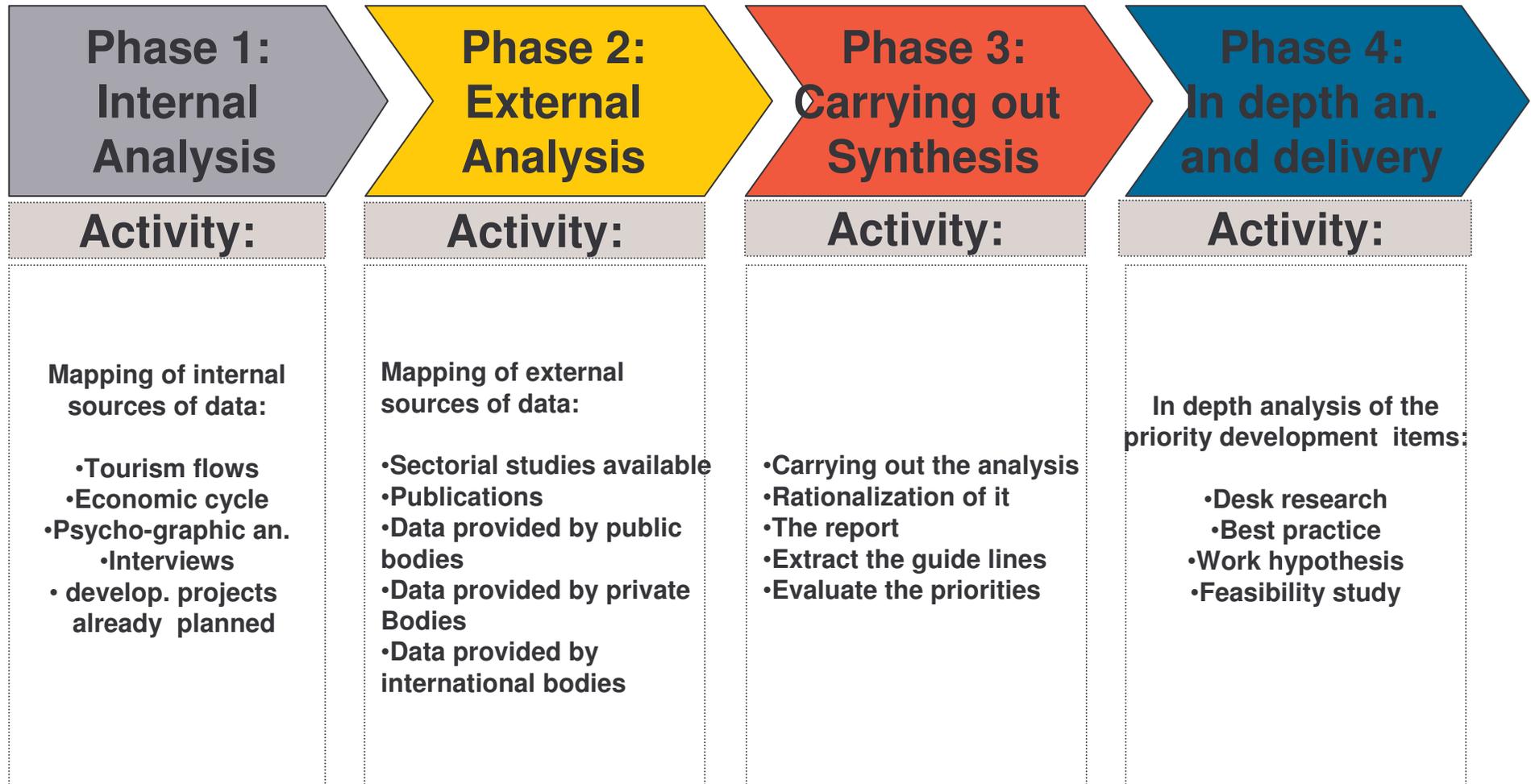
### 3) Define the guide lines for marketing plans;

- The project needs to carry out the match S-D operating on 4P

### 4) in depth analysis of the priority development items

- As a result there will be a list of priority on which to intervene
- To implement the priority at best leave the theory and get to the practice: *best practice* bench-marking (involvement of informed and self-conscious stakeholders).

# Tourism Observatory 9/13



## Phase 1: more details

Mapping of internal sources of data:

1) Interviewing people responsible for collection, handling and distribution of data about tourism;

2) Mapping source of available data about:

- Hotels, resorts and the like (arrivals, attendances);
- Economic structure and cycle of the sector (in IT: Chambers, Provinces, Business Associations);
- Data from touristic internet portal;
- Data from motivational research of the tourists (questionnaires and the like);
- Data about the use of touristic resources: museums' ticket, touristic promotional cards, editorial products (maps, city guide, and the like);
- Data about projects already planned by other authority: let's try to reach critical size by the coordination of the projects!

## Phase 2: more details

External analysis and positioning in national and international frame:

### 1) Sectorial studies on touristic market:

- Avoid to discover what somebody else already know!
- Get in touch with them and try to get cooperation: they could say “yes”;
- Carry out new studies only when necessary (no study available on relevant matter);

### 2) Main publications available:

- Italian public bodies:  
Enit; Istat ; Italian exchange bureau; Bank of Italy;
- Italian private bodies:  
Isnart; Touring club; Ciset, Studio Ambrosetti, Banca Intesa, Banca IMI;
- International bodies:  
World Tourism Organization, Eurostat;

## Phase 3: more details

Carrying out the data structure, synthesis and identification of the guide lines:

- 1) Rationalize and analyze collected data and information;
- 2) Evaluate of the tourism situation in comparison with international indicators and with the prevailing trend of development;
- 3) Carry out the report materially;
- 4) Plan the collection of new data (in case of necessity: expensive);
- 5) Extract guide lines for the co-marketing plan of the bodies involved in the promotion of the local tourism and in the creation of the local tourism product (as well as place and promotion) → a circular relationship with the stakeholders;
- 6) Identify list of priorities in a feed-forward and feed-back relationship with the stakeholders;

# Tourism Observatory 13/13

## Phase 4: more details

In depth analysis of the identified priority items and delivery of the documents:

1) Detailed analysis of the areas-niches of development identified ad priority:

- Ex: tourism and nature: agro-tourism and mountain tourism;
- Ex: tourism and business: meeting; congress;
- EX: tourism and low-cost: being a low cost company destination is good for us or not – 4P coherence?

2) More analysis by the use of “desk research”:

- Analysis of others’ experience at international level (get in touch, don’t be afraid of asking);
- Identify best practices;
- Hypothesis of application of best practices to your specific reality;

3) Release of the document!

# For further info & cooperation proposals

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