Analysis of Sicily's Tourism Industry and Destination Marketing

Sgroi, Manuela

2014 Laurea Kerava

Laurea University of Applied Sciences
Laurea Kerava

Analysis of Sicily's Tourism Industry and Destination Marketing

Manuela Sgroi
Degree Programme in Tourism
Bachelor's Thesis
November, 2014

Manuela Sgroi

Analysis of Sicily's Tourism Industry and Destination Marketing

Year	2014	Pages	47

The central subject of this thesis is the analysis of the tourism industry in Sicily and of its marketing strategy. It primarily aims to give an overall vision on the sector in the region, its brand, identity and, through the analysis of its marketing strategy, understand how it is promoted abroad. Marketing represents a vital aspect in every industry, and even more in tourism and tourism destination management, seen the quantity and variety of competitors in the market.

The theory of this dissertation includes basic marketing concepts and, entering the more specific territory of tourism marketing, destination marketing, destination branding and the role of the Destination Management Organizations. Destinations are challenging entities to manage and promote due to their complex structure and number of stakeholders involved; furthermore, they should not only be considered as a way to attract visitors but also as a force capable of enhancing the development of the area. These themes will be later discussed in the analysis of the Sicilian industry in the empirical section of the text.

The research part consisted of an analysis of secondary data from the Osservatorio Turistico della Regione Siciliana (Tourist Observatory), and a qualitative investigation in the form of a semi- structured interview with a marketing expert of the Regional Tourism Board of Sicily, in the offices of Palermo on 14th of May 2014. Mrs. Iannì was contacted via email in advance, and a meeting was set to discuss the matters.

The results of the combined quantitative and qualitative research revealed that Sicily has great potential as a tourism destination and much has already been achieved with the use of its resources, natural beauty and rich cultural heritage in order to attract tourists; according to forecasts, the number of visitors will continue growing in the future. Nevertheless, several gaps and weaknesses can be found especially in the marketing field and it will require a more organized and stable policy from the Regional Tourism Board in order to overcome them. Several initiatives have already been planned or implemented.

Table of contents

1 Introduction

1.1 Thesis purpose and research questions

Italy is one of the most visited countries in the world, ranking 5th in 2013 in the Top Tourism Destinations by international tourist arrivals (United Nations World Tourism Organization 2014, 6). The country is very popular in the collective imagination and almost everybody knows some of its features, about its millenary Roman history, art, traditional food, reflecting an effective and funded brand. Nevertheless, tourists are more likely to identify elements belonging to a specific region or city rather than the country as a whole; for this reason Italy can be considered as a collection of regional and city brands, and Sicily is one of them. In many cases however foreign tourists, though recognizing the brand, do not really know what it represents or includes, and what the region has really to offer. The duty of the Destination Management Organizations (DMOs) is to show and inform them, through their marketing campaigns.

The aim of this Bachelor's thesis is to give a complete overview on Sicily's image, brand, identity and to analyze the way it is marketed and promoted to foreign tourists. In order to reach this goal two research questions were formulated, and the whole research part of the text is aimed to answer them:

1. What is the current situation of the Sicilian tourism industry?
2. What is the marketing strategy used by the Sicilian Tourism Board and what are its main gaps?

The motives behind the choice of the topic were influenced by the author's personal background, Sicily being her homeland, and interest in finding gaps in the tourism system of the region. The thesis provides significant information on the region and main tourism attractions, as well as numbers and statistics. Nonetheless, the core problem of the investigation are the marketing aspects, what has been done so far in terms of tourism promotion and what are the weaknesses in the sector. Some development ideas can be found in the end, as the result of a productive discussion with a member of the Regional Tourism Board. Furthermore, the lack of structured material especially in English pushed the author to undertake this study, with the hope of producing new knowledge on the theme and raising the readers' awareness and interest towards the destination and products.

1.2 Research methods used

For the fulfillment of this study both quantitative and qualitative research methods were used in the empirical part. The former consisted of collection and analysis of secondary data and figures from the Osservatorio Turistico (Tourist Observatory), a body within the Sicilian Tourism Board, regarding the number of tourism arrivals in the region, the major nationality groups of visitors and accommodation distribution in the provinces. The information is extensively explained in the text and visually represented in the form of charts.

The qualitative investigation was applied to the research through an in- depth interview with a member of the Sicilian Tourism Board, Mrs. Roberta Iannì. The core theme of the interview was the marketing strategy used by the Board to promote the product "Sicily" abroad, E-Marketing and Social Media marketing and its relevance within the destination marketing of the region, destination branding and how to create a strong, recognizable image for a destination like Sicily.

1.3 Thesis structure

This thesis is composed by five chapters, each with a specific topic; nonetheless, they all are interconnected and consequential, giving to the text a logical and coherent structure. Chapter 1 represents an introduction to the main body, describing the background of the research, research questions, the reasons that led the author to the choice of investigating this topic, and an explanation of the research methods used. Chapter 2 contains the literature review and the theoretical part of the thesis, which is divided into six sections. Basic concepts of marketing, destination marketing and destination branding are among the topics covered, giving the reader the adequate general knowledge that will be later needed in order to understand the specific case of Sicily. Chapter 3 presents first an introduction to the destination: basic information and facts on the region and a brief history are given, for the purpose of raising the reader's interest and let him get acquainted with the general context of the island. Then the destination is, more specifically, analyzed from a tourist point of view with the help of a SWOT matrix and the four A's model; the major tourism attractions of the islands are also described in this sections, including the six UNESCO World Heritage sites. Finally in the last part of this chapter, the tourism industry of Sicily is carefully examined and presented through the analysis of secondary quantitative data obtained from the Sicilian Tourism Board.

Chapter 4 constitutes the core of this thesis and the research part. The data collection process is first explained, and then the results of the investigation (an in- depth interview) are displayed in the form of an analysis of the marketing strategy of Sicily. Some ideas and sug-

gestions for improvement are elaborated in the end following the analysis. In the last chapter of this dissertation (Chapter 5) general conclusions on the overall project are drawn.

2   Theoretical framework

2.1   Basic concepts of marketing

Countless definitions of marketing have been given over the years, each one of them focusing on different aspects of the practice; according to the American Marketing Association (AMA), marketing is "the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large" (2013). From this definition it is clear that marketing represents the process of communicating the value of a certain product or service to customers, with the purpose of showing them how they will benefit from choosing the said product over a competitor. Kotler, Wong & Armstrong describe marketing as "a social and managerial process by which individuals and groups obtain what they need through creating and exchanging products and value with others" (1996.)

All the definitions though indicate the essence of marketing, which is the interaction between organizations and customers and the creation of mutually favorable exchanges, with the main goals of reaching new customers and retain the usual, loyal ones. Customers are therefore the focus of marketing practices, as organizations need, in order to be successful, to design their products keeping customers' needs and expectations always in mind (Pride & Ferrell 2006, 4-9.) Hence, marketing can be considered as a vital element in every type of business and industry, and it should be accounted more as an organizational philosophy rather than a mere set of activities devoted to sell products and services. Furthermore, companies usually decide to maximize their efficiency narrowing the market size to that section that will actually be interested in the product, addressing their efforts to a specific target market after a careful analysis of customer behaviors and segmentations. Marketing include a wide variety of actions, from television, radio and printed advertisements, to flyers and brochures, special promotions and campaigns, Guerrilla marketing techniques, and many more. Especially nowadays with the growing importance of Information Communication Technologies, many organizations choose to concentrate on e-marketing through webpages and social media (Pike 2008, 26.)

2.2   Tourism destination marketing

Many definitions have been given to the word "tourism", and all of them vary for small details, including or leaving out certain elements or aspects that others do not. According to the

United Nations World Tourism Organization (UNWTO), tourism is "a social, cultural and eco-
nomic phenomenon which entails the movement of people to countries or places outside their
usual environment for personal or business/professional purposes". Hence, tourism is related
to people's activities, travelling to a place different than the usual one for various purposes,
and for a period of time of less than one year (UNWTO 1995). Mill and Morrison (1992, cited in
Pike 2008, 21) state that tourism is "the term given to the activity that occurs when people
travel. This encompasses everything from the planning of the trip, the travel to the destina-
tion area, the stay itself, the return and the reminiscences about it afterwards. It includes
the activities the traveler undertakes as part of the trip, the purchases made, and the inter-
actions that occur between host and guest in the destination area. In sum it is all of the activ-
ities and impacts that occur when a visitor travels". The tourism sector comprises several in-
dustries, such as hospitality, travel, entertainment, tour operations, that are strictly inter-
connected to make the big tourism machine work (Pike 2008, 20). Tourism nowadays is one of
the world's fastest growing economic industries, ranking 6th in the largest international trades
industries; more and more countries decided to invest in tourism, which has become one of
the most powerful key drivers in the socio- economic development and growth of the global
economy. In terms of numbers, it represents the 9% of the World's GDP and it generated in
2013 1.4 trillions of US$ in exports, representing the 29% of services exports, and 1 in 11 jobs
are in the tourism sector (World Trade Organization 2014; United Nations World Tourism Or-
ganization 2014, 2.)

As in any other business, marketing plays a fundamental role in the tourism industry. Tourism
phenomenon has only recently started to be considered as worthy of systematic studies and
attention, and the application of marketing approaches focused on the consumer within the
tourism sector is a relatively new fact, dating back to the last couple decades. Researchers
have therefore been concerned with the identification of key tourism marketing trends and
techniques (Kozak, Gnoth & Andreu 2010, 4). Because of the broad extent of the topic, in this
paper only destination marketing, destination branding and related issues will be discussed.

Despite the differences in academic definitions on tourism, almost all scholars agree that the
destination is the core of the tourism system or, as UNWTO states, "the fundamental unit of
analysis in tourism" (2002, cited in Pike 2008, 2). Destinations are "amalgams of tourism
products, offering an integrated experience to consumers" (Buhalis 2000). Destinations are
usually well defined geographical areas, such as a country, a region, an island or a city, which
attract visitors for a variable period of time and offer a cluster of resources and services
available for tourists. The above mentioned clusters can exist in different conditions, being
sections of a political boundary, as for example the Fisherman's Wharf in San Francisco, USA,
being a whole political boundary, as The Gold Coast in Australia, or crossing political bounda-
ries, e.g. the European Alps (Pike 2008, 24.) According to the UNWTO (2007, 1), a local desti-

nation "is a physical space in which a visitor spends at least one overnight. It includes tourism products such as support services and attractions and tourism resources within one day's return travel time. It has physical and administrative boundaries defining its management, and images and perceptions defining its market competitiveness. Local destinations incorporate various stakeholders, often including a host community, and can nest and network to form larger destinations". The lack of adequate tourism clusters can be one of the reasons of unsuccessful tourism policies, as a market research on the competition between Bali and Fiji shows: Fiji failed to meet tourists' demands in relation to attractions and services, and this caused the loss of 50% of Australian short-haul market share between 1982 and 1995 (Pike 2008, 24.) Furthermore, Buhalis (2000, 2) emphasizes that fragmenting the destination in smaller sections according to the 6 A's framework can help in the analysis and management of the amalgam of services and products (see Table 1 below).

> **Attractions** (natural, man-made, artificial, purpose built, heritage, special events)
> **Accessibility** (entire transportation system comprising of routes, terminals and vehicles)
> **Amenities** (accommodation and catering facilities, retailing, other tourist services)
> **Available packages** (pre-arranged packages by intermediaries and principals)
> **Activities** (all activities available at the destination and what consumers will do during their visit)
> **Ancillary services** (services used by tourists such as banks, telecommunications, post, newsagents, hospitals, etc)

Table 1: Six A's Framework for the analysis of tourism destinations
     (Buhalis 2000, 2)

As several authors agree, destinations are among the most problematic and difficult elements to manage and market, due to the complex nature of its internal structure and variety of stakeholders involved. Each of them has a precise sets of goals and objectives that differentiate from the ones of other enterprises or service providers; these dissimilarities can lead to conflicts and dysfunctions in the system, making it even more challenging for organizations to meet every stakeholders' wishes and interests and carry out their management duties. Among other elements, one of the major issues to be taken into consideration is undoubtedly the safeguard of the natural assets of the destination, that in some cases might be utilized unreasonably or even exploited to reach short-term goals. One of the key factors to a successful management and marketing of a destination consists of creating compromises and balance between the various stakeholders, trying to share the benefits originating from tourism industry properly among the parts involved. As displayed in Table 2 below, a combination of simple common sense and fairness can help in reaching this objective (Buhalis 2000, 2-3.)

- ➢ Enhance the long term prosperity of local people
- ➢ Delight visitors by maximising their satisfaction
- ➢ Maximise profitability of local enterprises and maximise multiplier effects
- ➢ Optimise tourism impacts by ensuring a sustainable balance between economic benefits and socio-cultural and environmental costs

Table 2: Strategic management and marketing objectives for destinations
(Buhalis 2000, 3)

Apart from the presence of sufficient clusters and services in the destinations and harmony among the stakeholders, another element that has to be carefully considered is a vigorous marketing strategy, which is needed to convince the tourist of the uniqueness of the location. Destinations need stronger marketing actions than any other sector or business, since customers have a much wider range of choices at disposal, and many factors such as distance and flight prices can influence the decision; therefore National and Local Tourism Boards need to find that particular feature of the destination which makes it special and unique and superior to the similar competitors (Pike 2008, 43).

Destination marketing should not only be seen as a means to attract visitors, but mainly as an essential tool to promote development in the destination and enhance its management strategies and competitiveness (Buhalis 2000, 4). Destination competitiveness is a highly relevant concept within destination marketing in regard to this study, being a combination of economic, social, cultural and environmental aspects. This field has only been researched since the 1990s, becoming one of the focal points in the strategies of Destination Management Organizations (DMOs). In 2004, the World Travel and Tourism Council (WTTO) conducted a study with the aim of creating a destination competitiveness index, analyzing and evaluating the competitive environment in over 200 countries. The criteria used for the research were Price competitiveness, Human tourism, Infrastructures, Environment, Technology, Human resources, Openness and Social. A 0-100 index value was created, and the criteria were assessed green, orange or red light, depending on the performance and value obtained. Australia ranked first for infrastructures and technologies, while China surprisingly was regarded as a leader in price competitiveness. One of the major challenges in reaching a satisfactory destination competitiveness is represented by the fragmented, heterogeneous tourism industry in the destination (Pike 2008, 40-45.)

An effective and successful marketing strategy does not only include a perfect understanding of destination marketing and destination management concepts but, more in general, of the whole tourism industry. One of the first actions to take in order to create an appropriate marketing strategy is to identify and categorize the destination typology, based on its main feature. This task may not be easy, since in some cases different categories overlap due to the different motives that leads tourists in that location, yet it is extremely useful for mar-

keting and promotion purposes. Buhalis recognizes six destination typologies: Urban, Seaside, Alpine, Rural, Authentic (Third World) and Unique-Exotic-Exclusive destinations (Buhalis 2000, 6-8).

Furthermore, Wang (2011, 5) argues that for a comprehensive and integrative approach to destination marketing, the following issues should be emphasized: the concept, scope and structure of destination marketing and destination management practices; consumer decision making factors regarding the destination; principles and functions of the destination image, positioning and communication; destination product development; product distribution; strategies and approaches on relations with stakeholders; management of destination sustainability and competitiveness and, last but not least, safety, crisis and disaster management.

Additionally, Buhalis (2000, 8) highlights the importance of marketing research and market segmentation in order to determine the target market for the destination, formed by customers that will actually be interested in the offer and potential customers. Finding the correct target market and directing the marketing efforts towards it will definitely maximize the effectiveness of the destination marketing actions, as well as helping the stakeholders to provide the most appropriate set of services and products which will meet or even exceed the demand's expectations and demands. Table 3 below reveals the role of marketing research within destination marketing.

> - Identification of the main attributes anticipated by each market segment
> - Design and attributes required for tourism products and services
> - Evaluation and development of destination image
> - Segmentation of market and development of corresponding marketing mixes
> - Opening new markets and reducing dependency on existing ones
> - Evaluation of the elasticity of demand for each market segment
> - Reduction of seasonality by matching market segments
> - Examination of reasons deterring people (suppressed demand) from visiting destinations
> - Assessment of compatibility with other target markets
> - Examination of alternative distribution channels
> - Assessment of tourism impacts to the destination and selecting the right segments
> - Evaluation of marketing effectiveness and selection of media for promotion

Table 3: Contribution of marketing research to destination marketing
        (Buhalis 2000, 8)

2.3   Destination marketing mix

As mentioned before, creating a robust marketing strategy and marketing mix for destinations is very challenging, particularly due to the variety of stakeholders and interests implicated. Nevertheless, this marketing tool represents the most effective method for reaching the tar-

get market and achieve the goals and objectives set. The marketing mix is based on 4P's theory by McCarthy:

- Product: in this case, the destination and all the services, amenities and attractions it offers.
- Price: pricing the destination depends on a multitude of factors, as for example the target market that they want to reach, the situation of the local and national economy, prices of individual suppliers and intermediaries both at the destination and in the place of origin, etc.
- Place (Distribution): the distribution channels used to sell the destination and approach the target market sought. This includes also the role of intermediaries in relation to business and leisure travelers, who have different needs and thus have to be approached and dealt with in different ways.
- Promotion: the set of promotion and marketing channels used to sell the product. This covers promotion, sales, offers, advertising, publicity. Buhalis (2000) recognizes two different categories of techniques: Above the line activity which entails active promotion through press, television and radio advertisements, specific campaigns, etc. An example of Below the line technique instead is the participation to travel and tourism fairs worldwide, where networking with intermediaries and displays of the offer to the public (and potential customers) takes place (Buhalis 2000, 16-21; UNWTO 2007, 57- 58.)

In certain situations on the other hand, a need for de-marketing has been spotted, due to various reasons such as excessive numbers of visitors which might damage the destination resources or sites, and the desire to limit mass tourism phenomenon in favor of specific target groups. De- marketing techniques include increasing prices of services and products at the destination, reducing quality or content of services, eliminating trade discounts, allowing only scheduled flights over charters, warning tourists of capacity limitation, discouraging excursionists and visitors who do not stay overnight, etc. This practice is still not very popular and effective, and little literature exists about the topic (Buhalis 2000, 4-5; Pike 2008, 107-108.)

2.4   Destination branding

In order for the destination marketing strategy to be successful and efficient, one of the most powerful tools available for DMOs is branding. A brand is a competitive identity, a core of characteristics of a product. When applied to a destination, it refers to its essence and personality, which make it distinctive from its competitors; it is an image that tourists have of that specific location, including tangible and intangible elements, e.g. respectively attractions and values embedded in the destination. Much more than this, it expresses a promise to

visitors, creating a certain level of expectations. UNWTO identifies two different types of brand: geographic and thematic. The former is the most common, focusing on the geographical boundaries of the destination, while the latter refers to specific themes which make the destination unique, and it unites products and experiences offered. Thematic brands aim therefore much more to the emotional sphere of visitors rather than physical aspects. Examples are represented by wine routes in France, or Italian style and fashion (UNWTO 2007, 45; UNWTO 2009, 6-10, 18-20.)

Creating a destination brand can be a very challenging and complicated job, due to a number of variables that can become obstacles to the process. Examples are limited financial resources, which interfere with time and efforts spent in market research for brand planning; interference by Government and political entities, which could influence and try to modify the image created; unpredictable external environment or events, which can deeply affect the industry and businesses in the destination; difficulties in delivery the product created, and many more. Regardless of the difficulties, creating an effective brand can bring immeasurable benefits to the destinations. Despite all the above mentioned challenges, giving a unique identity and presenting a strong brand will bring numerous benefits to the destination; among the most important are raising the customer awareness and creating new interest towards the destination, enhancing therefore the demand size. Effective branding is also vital in order to highlight the differences and distinctiveness from the competitors in the offer of services, attractions and character, giving the destination a strong identity and personality. Another key objective of destination branding is the one of creating a positive imagine recognizable by potential visitors, which will eventually lead to customer loyalty and increased value (UNWTO 2007, 45-46; UNWTO 2009, 33.)

A typical branding process includes a series of crucial steps that need to be followed:

- Destination audit: a careful research and analysis of the destination and its assets, which need to be prioritized according to the interests of the main market segments.
- Segmentation analysis: the process of identifying the main market segments, which will represent the destination target market.
- SWOT analysis: the analysis of Strengths and Weaknesses internal to the destination, and external Opportunities and Threats, which represents an extremely important development tool.
- Stakeholder engagement: this step aims to include the major stakeholders in the branding process, searching for cooperation and taking into consideration their ideas and contribution.
- Consumer perception research: in order to find out the image and perception that consumers have of the destination, and be able to develop it or strengthen it afterwards.

- Competitor analysis: indispensable tool in every business planning stage, it allows brand planners to know where the destination stands in respect to its competitors; it also gives information about customers main motivations to travel, what they look for in a destination and why they choose one over another.
- Brand-building models: there are several models that can be used for this process, e.g. the Brand Pyramid (see Table 4 below), but in general they all have the scope of helping finding the core essence of the brand.
- Integrating the brand into marketing activities: once the brand has been created, it is the moment of integrating it into the marketing activities undertaken by the destination. The brand values, together with the strategic message it communicates, have to be shown in the imagery and tone used in the marketing channels.
- Global versus local marketing campaigns: at this point, choosing the right size of the marketing campaign is very challenging, because there is a double risk of lowering and reducing the brand message on one hand, and not reaching the desired target market on the other hand. However, global campaigns developed by National Tourism Organization head offices and distributed on an international level have the advantage of being cost-effective, while local ones can target the local market in a much more individual and customized way. A "glocal" solution, which is the combination of both, could be one of the best answers, taking only the positive aspects of both.
- Global brand versus target segments: one of the last stages consists in understanding how the global brand created can target individual segments in different countries through diverse marketing campaigns. The answer is simply given by the fact that even though the main global values of the brand are found in the local campaigns, those choose each time the most appropriate approach to the selected target segment, using different messages and methods (UNWTO 2009, 34- 56.)
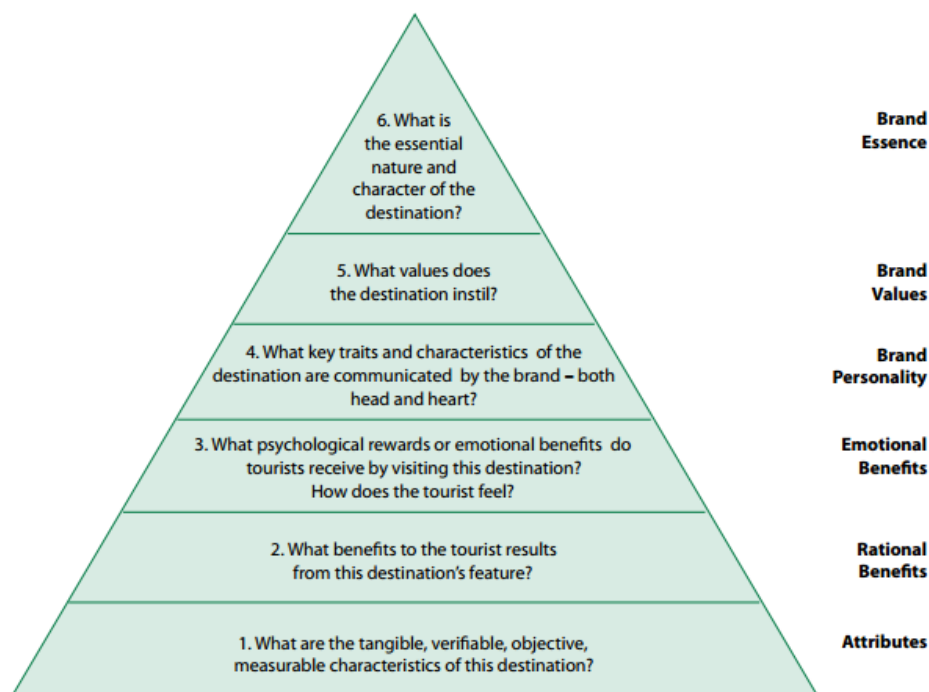
The pyramid from bottom to top:

1. What are the tangible, verifiable, objective, measurable characteristics of this destination? — Attributes

2. What benefits to the tourist results from this destination's feature? — Rational Benefits

3. What psychological rewards or emotional benefits do tourists receive by visiting this destination? How does the tourist feel? — Emotional Benefits

4. What key traits and characteristics of the destination are communicated by the brand – both head and heart? — Brand Personality

5. What values does the destination instil? — Brand Values

6. What is the essential nature and character of the destination? — Brand Essence

Table 4: The Brand Pyramid
(UNWTO 2007, 49)

2.5 Destination Management Organizations

In order for a destination to be popular and keep high standards in product and service offers, marketing procedures are not sufficient, but larger actions have to be taken, which go under the Destination management concept (Morrison 2013, 5). Invaluable bodies for destination management and marketing are the Destination Management Organizations (DMOs). DMOs started emerging in the last decades of 19th century with the scope of coordinating and managing the tourism suppliers in the destination under a coherent strategy, aiming to reach high levels of competitiveness and services (Pike 2008, 36-37.) According to the Association of Destination Management Executives (ADME), a DMO is "a professional services company possessing extensive local knowledge, expertise and resources, specializing in the design and implementation of events, activities, tours, transportation and program logistics" (2014). As stated by UNWTO (2007), the role of these entities vary depending on their nature, but in overall several main functions can be recognized:

- Leading and coordinating the activities and operations of the stakeholders involved in the destination.
- Marketing of the destination and development of strategies to enhance the level of competitiveness and popularity of the destination, through promotional campaigns and relationships with incoming agencies or other tourism organizations.

- Preserving environmental and community resources, establishing national parks, protected areas or regulations against environmental or human exploitations. This involves also control over sex tourism and human trafficking.
- Developing and improving infrastructures and human resources.
- Delivering the product, offering tourists the best possible experience and exceeding their expectations.

In addition to this, DMOs also take care of technology and systems development, cooperation with other sectors, regulations and legislation and, in the marketing branch, information services through Tourism Information Offices and Customer Relationship Management. (UNWTO 2007, 2-5.)

Different types of DMOs can be detected, as for example National Tourism Organizations (NTOs), Regional Tourism Organizations (RTOs), Local DMOs and Conventions and Visitors Bureaus, depending on the territory handled or functions carried out. National Tourism Offices are responsible for destination management on national level; the first NTO was established in New Zealand in 1901 with the name of "New Zealand Department of Tourism and Health Resorts, example that was then followed by other counties later on. Decades later in Europe, the Alliance Internationale du Tourisme was created in Brussels in 1919 to foster the cooperation of more than 30 European NTOs. Regional (or Provincial or State) DMOs operate on smaller territories, and their origins trace back to years before the National organizations. One example is the Swiss RTO in St. Moritz established already in 1864. Local DMOs usually focus their management efforts only locally on one city or town. As for the names used by those organizations, a notable variety exists, e.g. Agency, Board, Centre, Office, Ministry, Authority, Department, Council, etc. (Pike 2008, 37-40, 61-62.)

Each DMO has the task of elaborating a vision and core values, which support the objectives of the organization. The vision can be defined as that image towards which the destination aims and works to become in a defined future, and it can be considered as an inspirational and motivational factor. The organization values are a set of beliefs and ideas according to which the DMO works and operates. Vision and values are showed in the mission statement, which aspires to have a strong impact on visitors' minds and attract them to the destination. Moreover, DMOs establish goals as broader, long-term intents, which have the function of supporting their mission and show that some action has been taken on practical level. Based on the goals, objectives can be set. Those are more precise and defined targets, which ideally should be SMART, an acronym that stands for Specific, Measurable, Achievable, Realistic and Time-constrained. Examples can be increasing the number of tourism arrivals or tourism receipts within a certain frame of time, generating a certain number of new job in tourism or creating a x number of additional beds available (UNWTO 2007, 36-37.)

2.6 Role of the Government and private sector

For the great majority of the DMOs, even for those established within the private sector, the role and intervention of the Government for their development and success has been invaluable. One of the major issues in this area is represented by the use of public funds, originating from tax payers, which are invested to financially support the DMOs, which otherwise would probably struggle to survive (Pike 2008, 78-81). Destination governance, which has attained more and more significance over the last decade, is described by Beritelli, Bieger & Laesser (2007, 96, as cited in Morrison 2013, 24) as the act of establishing rules and policies, business and management strategies and which involve all the stakeholders in the destination. Most of the DMOs until today were managed by the public sector and government bodies, while recently a tendency to create close collaboration and partnerships between the public and private sector has been noticed (Buhalis 2000, 21-23; Morrison 2013, 24; Pike 2008, 78-81.)

3   Sicily

"To have seen Italy without having seen Sicily is to not have seen Italy at all, for Sicily is the clue to everything". With these words the German writer Johann Wolfgang von Goethe describes Sicily after his stay in 1787, emphasizing the charm and allure of the island. Meeting point of Europe and Africa, Eastern and Western civilizations, during its long history the region has seen countless foreign dominations, from Phoenicians, to Greeks, Byzantines, Normans, Arabs, all interested in the commercial and strategic value of its position in the center of the Mediterranean. The strong influence and mark left by those populations can still be seen today in the complex nature of many Sicilian cultural aspects, such as art, culinary tradition, language, etc. making of it a multifaceted mosaic (Lonely Planet 2013.)
In this chapter some basic facts and information about Sicily will be given, and a brief summary of its thousands-year old history will be presented, in order to provide the reader with the means for a better understanding of the context. The region will also be analyzed from a tourism destination perspective, with the display of tourism figures and statistics from the past few years.

3.1   Basic info on the region

Sicily is the largest island of the Mediterranean sea located right in the middle of it, being only 3 km distant from the Italian peninsula and 140 km from the North African coast; it has an area of 25 708 kmq and a population of approximately 5 043 480; it is the largest of the twenty Italian regions and one of the five with autonomous status, with regional capital Palermo, where the Sicilian Parliament is located. The territory is divided into nine provinces: Palermo, Catania, Messina, Trapani, Siracusa (Syracuse), Ragusa, Enna, Caltanissetta, Agrigento. The population composition is homogeneous, with 98% of Italian citizens and only 2% of immigrants (approximately 100 000 people), mostly Romanians, Tunisians, Moroccan, Sri Lankans, Albanians. The official language, as in the rest of the country, is Italian, although Sicilian dialect is widely known and used especially by older generations, and the primary religion is Catholicism. The most populated cities are Palermo with 655 343 and Catania with 292 855 inhabitants, which also form the only two metropolitan areas of the region (Regione Siciliana 2011.)

Sicily is surrounded by three archipelagos (Aeolian islands, Aegadian islands and Pelagie) and other minor islands, Ustica and Pantelleria, which belong to the region. Its 1000 km long coastline is mostly rocky in the northern part and sandy in the south; the territory is largely mountainous and hill, with several mountain chains (Peloritani, Nebrodi, Madonie, Iblei, Erei). Sicily is also home of mountain Etna, the highest active volcano in Europe with 3330 m, destination of many sport and nature tourists, which was inscribed in the World Heritage list last

year. The climate is predominantly Mediterranean, with hot, dry summers and mild short winters. Catania holds the European record for the most sunshine, with more than 2 500 hours a year, and rainfalls mostly happen between October and March. Therefore, the best period to visit the island is late spring, due to not excessively hot temperatures (Regione Siciliana 2011.)

Illustration 1: Map of Sicily

3.2   Brief history

Sicily's history is very long and complex, and its beginnings date back to thousands of years ago. Traces of early settlements go back to 4000-3000 BC, and the first society ever recorded on the island was the Sicanian tribe, whose origin is still controvert: according to some historical sources as Thucydides, they were believed to have come from the Iberian Peninsula, although it is nowadays commonly accepted that Sicanians were an indigenous population. Later on, Elymian tribes from Greece settled in the northwest corner of the island, pushing the Sicanians in central and southern areas; around 1200 BC Siculians descended from the Italian peninsula colonizing the northeastern part of the island, creating a cultural and linguistic division that will be kept in the following centuries (Regione Siciliana 2011.)

In 8th century BC, Greeks started establishing their first colonies in Sicily such as Naxos and Syracuse and added it to the Magna Graecia, after absorbing the already existing ethnic

groups and introducing their culture, religion and traditions in the new territories. During this period of time, many temples (e.g. Segesta, Selinunte, the Valley of the Temples in Agrigento) and theaters (in Syracuse and Taormina) were built in the island, which became a flourishing trading region thanks to its fertile soils and strategic position. The growing Greek power caused tensions with the Carthaginians who were settled in the western part of the island, which resulted in the 300year-long Greek-Punic wars. During those same centuries, the Roman Republic stood out as the new military and political power of the Mediterranean, conquering wide territories to expand their influence, and aiming their interest toward Sicily. After the First Punic War, where Roman armies defeated Carthaginians, in 242 BC Sicily became the first Roman province; few years later, during the Second Punic War, Carthaginians were definitively defeated and expelled from the island, which became a prosperous province, although maintaining a strong Greek mark in the language used and culture (Lonely Planet 2008, 27-28.)

During the downfall of the Western Roman Empire and after it collapsed, Sicily was invaded by several German tribes, such as Vandals and Ostrogoths; the Byzantines conquered back the territory and Greek language spread again over the region. Two hundred years later, the Byzantine commander of Sicily, after being driven out to Africa for the assassination of a general, traded the island in return for his own safety. Began this way the Arab occupation of Sicily, which encountered strong resistance from the islanders and took over a century to be completed, in 902 (Regione Siciliana 2011.)

The Arab domination brought to Sicily improvements in the irrigation systems, which led to a growth in the agriculture, as well as import of products such as pistachio and citrus trees, which today are part of the traditional gastronomy of the region. During the Muslim reign, Arabic language was widely spoken in the island, and still today in the modern Sicilian dialect its influences can be seen in certain words or expressions. At the end of the 11th century the power of the Saracens began to weaken due to fights for the succession (Regione Siciliana 2011.)

Normans, who in those years had conquered southern Italy, took advantage of the vulnerability of the Arabs, occupying the island in 1091. During their kingdom, Sicily went through a new period of glory, becoming the most brilliant and unique center of culture of the Mediterranean in the court of king Roger II, attracting poets, artists, philosophers, scientists from both Western and Eastern world and creating a diverse, multicultural society; the capital Palermo, and other major cities, were adorned with great buildings. The Kingdom of Sicily became one of the most powerful and wealthy states of Europe, even surpassing the Kingdom of England (Regione Siciliana 2011.)

When, at the end of the century, the dynasty died, Sicily shortly became part of the German Holy Roman Empire with Emperor Fredrick II; because of conflicts between the Pope and Fredrick, the Kingdom of Sicily passed then under the French control, causing insurrections and riots all over the island; the Sicilians formed then an alliance with the Spanish House of Aragon, who ruled until the end of 17th century, when French invaded and occupied again the island, leading to the creation of the Kingdom of Two Sicilies together with Naples. During the 19th century, the feeling of oppression for centuries of foreign domination brought to numerous insurrections and revolutionary movements seeking independency (Regione Siciliana 2011.)

In 1860, during the movement for the unification of Italy called Risorgimento, Sicily was taken and freed by the leader Giuseppe Garibaldi, becoming officially part of the newly born Kingdom of Italy in 1861. From this moment on, the history of the island followed the events in the rest of the peninsula, although being characterized by the fast growing phenomenon of mafia, and the underdeveloped level of economy and infrastructures, which caused massive emigrations to the United States and Central Europe between the end of the 19th – beginning of 20th century. During the second postwar special fundings from the Italian government helped the economic growth of the island, with the creation of industrial and commercial areas and a general improvements in the infrastructures and services. The unemployment rates decreased and the struggle against the Mafia still continues today (Regione Siciliana 2011.)

3.3   Sicily as a tourism destination

Sadly famous abroad for the mafia phenomenon and frequent eruptions of the Mt. Etna, Sicily offers a wide variety of tourism attractions to visitors: the most diverse landscapes from seaside to mountains, natural reserves and parks, cultural and archaeological locations, six sites inscribed in the UNESCO World Heritage list, as well as two in the intangible list, unique culture and heritage, local folklore and food festivals, making of it a pearl in the Mediterranean that is still to be discovered by most tourists and travelers. Among the most popular sites, Taormina and Syracuse, the Greek ruins of Valley of the Temples (Agrigento), Segesta and Selinunte, the Aeolian islands, also called 'the pearls of the Mediterranean', Mt. Etna and the town of Cefalù.

As displayed in the SWOT analysis matrix below (Figure 1), many are the internal strengths of the island that can be, and already are, exploited in the tourism sector.

- The optimal climate, with mild winters and hot summers makes it possible to visit the island all year around; in addition to that, splendid sandy and rocky beaches and tur-

quoise sea make of it a popular summer destination for the lovers of the 'Sun- Sea-Sand' types of holiday.

- Its rich cultural and artistic heritage originated from the succession of foreign civilizations over the centuries, each of which left its own indelible mark in the island's character and legacy, still visible in archaeological ruins and historical sites.
- The substantial number (6) of UNESCO World Heritage sites, both cultural and natural
- Its popular and strong brand, being one of the most searched destinations in Italy; the fact that the capital Palermo has been ranked 4th worldwide among the best street-food destinations in VirtualTourist is a clear sign of tourists' interest and appreciation
- The sense of hospitality of Sicilian people, which is well known abroad
- It can offer a wide variety of tourism products and niche (sport tourism, sea tourism, cultural tourism, religious tourism, film tourism, etc.)
- The possibility to combine different products (e.g. sea+ mountain, art + gastronomy) and create thematic itineraries (Iannì 2014.)

Although the tourism industry in Sicily is today relatively well developed, there are still some factors which limit a faster growth and represent weaknesses, as for example the malfunctioning public transportation system especially in the internal areas of the island and the poor connection with other destinations. Furthermore, there is a lack of a structured tourism offer easily reachable online and the cooperation between the various stakeholders and between public and private sector is still rather poor. Also, there is a need for creating competitive prices compared to similar destinations (Iannì 2014.)

Nevertheless, there are certain situations and assets that could represent great opportunities for Sicily to attract an even bigger number of visitors, such as the many religious festivals that annually take place in the island, namely St. Agatha (patron saint of the city of Catania) and St. Lucia (patron of the city of Syracuse), which are unique representations of the local folklore, in a combination of religion, legend and traditions. Other opportunities to expand the Sicilian tourism market are also represented by the many cruise ships which depart/ stop in the harbors of Messina and Palermo bringing in a large amount of tourists and potential spenders, and the increase of the number of low cost flight from companies such as Easy Jet and Ryanair that fly to the region, allowing a more affordable access to the island. Seen the growth of rural and culinary tourism niche in the last few years, the "agriturismi" (agritourism type of accommodations in the countryside) could be a valid alternative to usual hotels and bed & breakfasts, giving tourists the chance to live an authentic rural experience in a usually family-owned farm/ranch, and eat locally produced food. Furthermore, the growth of the demand for nature tourism and cultural tourism itineraries could make of Sicily the per-

fect destination for every type of tourists. Last but not least, de-seasonality could represent a valid alternative to travelling in the high season (Iannì 2014.)

Among the external threats that might affect negatively the tourism sector, the one of access should be taken into consideration: being an island, not connected to the mainland through bridges, the only access to the region is provided through air traffic and sea. Sicily has 6 airports: Palermo- Punta Raisi, Catania- Fontanarossa, Trapani- Birgi, Comiso, and Lampedusa and Pantelleria located on minor islands. In particular situations, as for example caused by the unpredictable activity of Mt. Etna which erupts several times a year, Catania- Fontanarossa International airport is forced to close due to the ashes issued which are very dangerous for aircraft engines, bringing irreparable discomforts and inconveniences. Access by sea to the minor islands is sometimes limited in winter time due to bad weather conditions. Other threats could be represented by minor criminal acts such as pickpocketing and scamming directed to tourists which might interfere with tourism safety; a faster growth by competitors like Balearic Islands or Croatia which offer similar products and the lack of differentiation by Sicily; the risk of impoverish and overexploit the natural resources of the island (Iannì 2014.)

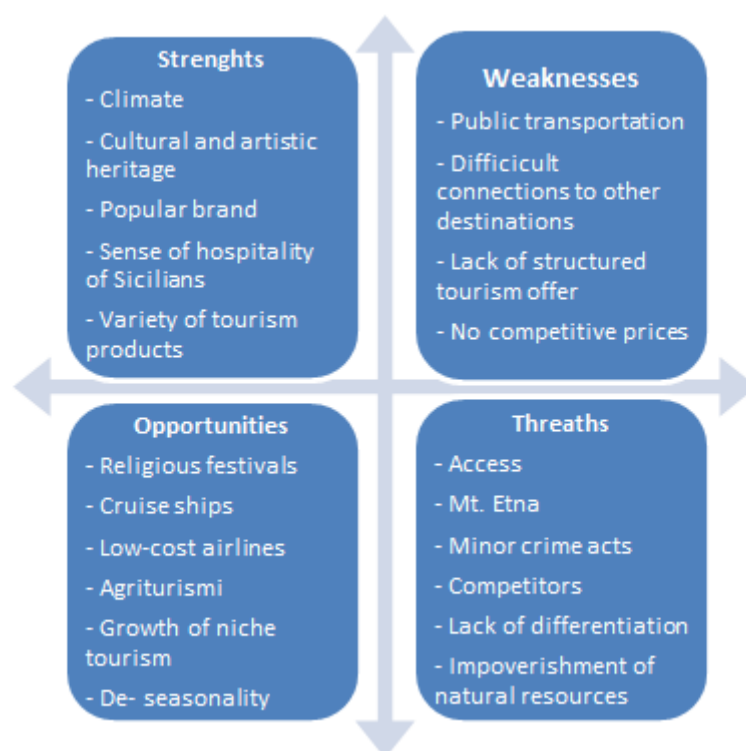| Strenghts	Weaknesses
- Climate - Cultural and artistic heritage - Popular brand - Sense of hospitality of Sicilians - Variety of tourism products	- Public transportation - Difficicult connections to other destinations - Lack of structured tourism offer - No competitive prices
Opportunities	Threaths
- Religious festivals - Cruise ships - Low-cost airlines - Agriturismi - Growth of niche tourism - De- seasonality	- Access - Mt. Etna - Minor crime acts - Competitors - Lack of differentiation - Impoverishment of natural resources

Figure 1: SWOT Analysis of Sicily as a tourism destination

As already mentioned, a severe issue that Sicilian tourism has to deal with is the seasonality: as shown in Figure 2, most of the tourism arrivals in 2013, both domestic and international, are concentrated in the summer season – which in the island lasts from May to September- while numbers drastically decrease as winter approaches. For Italian tourists, as the graphic

clearly displays, the peak is in the month of August, while international visitors are mostly present in May and September, probably due to more suitable temperatures (Matias, Nijkamp & Sarmento 2011, 269, 272-273.)
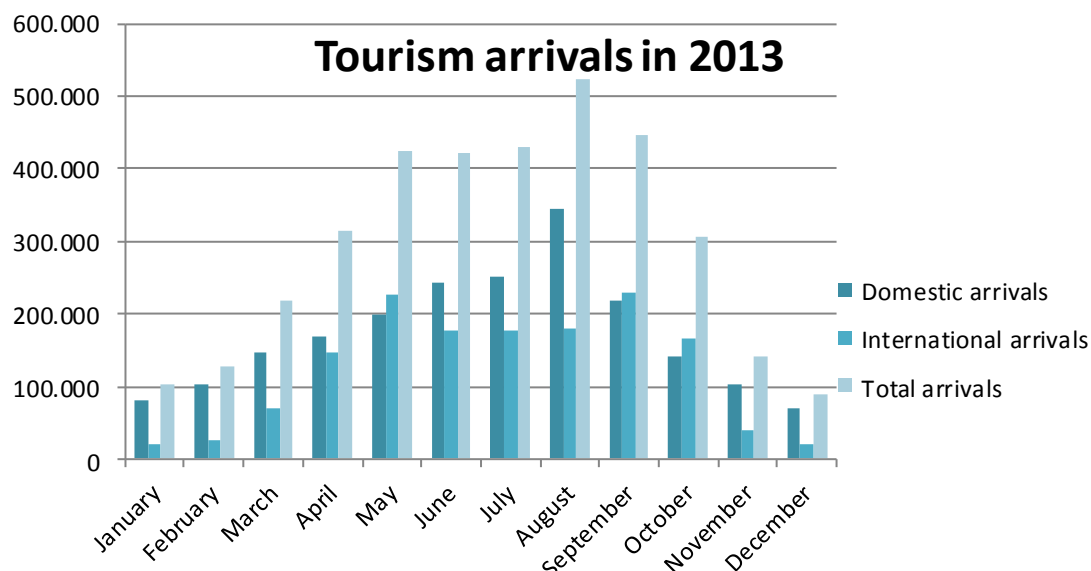

Figure 2: Tourism arrivals in Sicily in 2013

       (Data from Osservatorio Turistico della Regione Siciliana)

Analyzing the destination with the use of the 4 A's tourism model (Attractions, Amenities, Accessibility, Ancillary services), it is easy to get a clearer picture of what the region has to offer.
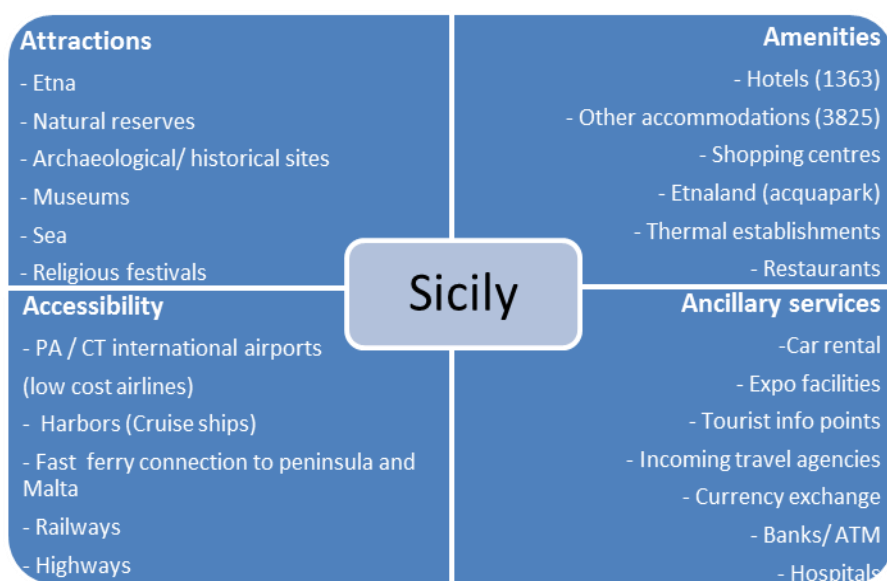
Figure 3: 4 A's framework analysis of Sicily as a tourism destination

3.4   UNESCO World Heritage sites in Sicily

Out of 50 UNESCO World Heritage sites in Italy, 6 of them are located in Sicily:

- Archeological Area of Agrigento
- Late Baroque Towns of the Val di Noto
- Syracuse and the Rocky necropolis of Pantalica
- Villa Romana del Casale
- Aeolian islands
- Mount Etna

The Archaeological area of Agrigento, also known as Valley of the Temple, is an extended archaeological site that preserves the ruins of the ancient Greek polis of Agrigento (Akragas), founded in the 6th century BC and soon become one of the most powerful of the Mediterranean. The site was inscribed in the World Heritage list in 1997; most of the ancient ruins, including superb examples of Doric temples and excavations, are still in almost intact conditions and represent some of the most fine examples of Hellenic art (UNESCO 2014.)
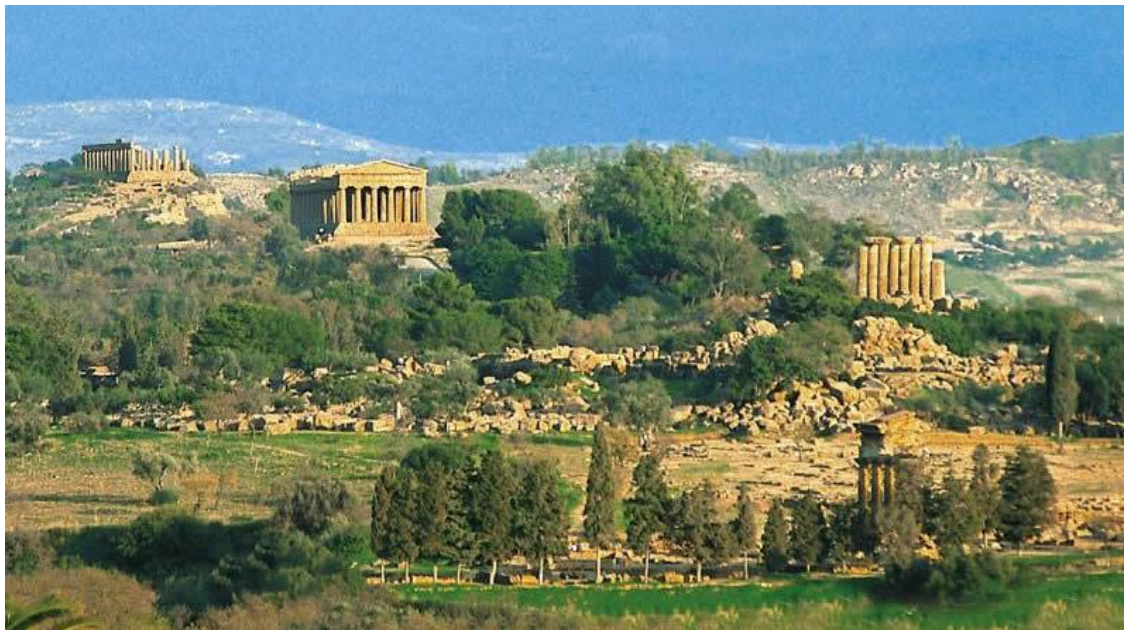
Illustration 2: Archaeological area of Agrigento

The Val di Noto is an area in South Eastern Sicily which include 8 towns and cities: Militello Val di Catania, Catania, Modica, Noto, Palazzolo, Ragusa and Scicli. The entire area was hardly struck and partially destroyed by the violent earthquake of 1693, and later rebuilt in Baroque style. The reason for the inscription of the site in the UNESCO list (2002) is mostly due to the excellent quality of the architecture, being considered as an outstanding testimony

and the culmination of Baroque in Sicily. Examples are the cathedral of Noto and the Piazza del Duomo in Catania (UNESCO 2014.)

Illustration 3: Baroque Cathedral of St. George in Modica, Val di Noto

The site of Syracuse and the Necropolis of Pantalica is formed by two separated elements. Ancient Syracuse contains the heart of the ancient city, Ortygia, which was described by Cicero as the most beautiful of all the Greek colonies, and numerous Greek sites such as the theater (still in use today to display Greek tragedies during spring time) and the Temples of Apollo and Athena. In addition to this, many are the testimonies of the later civilizations that settled in the area, such as the Roman amphitheater and Catacombs (the largest after Rome itself) and buildings in Byzantine, Arabic and Norman styles.

The Necropolis of Pantalica is a hilly area with caverns and precipices that counts about 5 000 tombs cut into the rock, dating back to 13th to 7th centuries BC. Remains of dwellings from the period of Greek colonization, artifacts of Mycenean origin and monumental structures were also found during excavations. Moreover, the area was reoccupied in the 9th-10th centuries, during the Arab invasion (UNESCO 2014.)

Illustration 4: Necropolis of Pantalica

The Villa Romana del Casale is an ancient Roman Villa located in Piazza Armerina in the heart of Sicily. The villa represents one of the most luxurious examples of residence of this kind, and its importance is mainly related to the excellent quality and conditions of the mosaics that decorate the entire building. They are considered as the most precious mosaics in situ among all the Roman world (UNESCO 2014.)
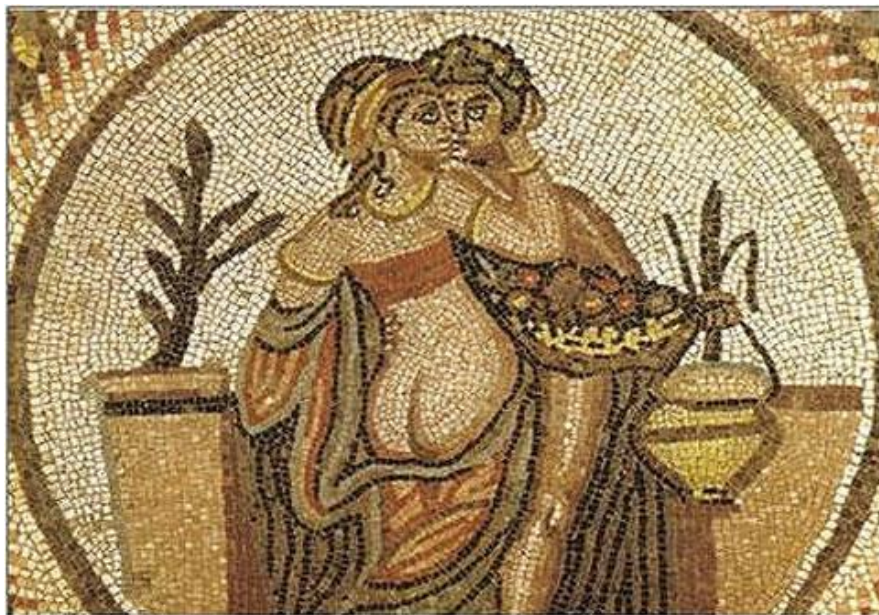

Illustration 5: Mosaics in the Villa Romana del Casale

The Aeolian Islands is an archipelago located north of Sicily, and it consists of seven islands of volcanic origins: Lipari, Stromboli, Vulcano, Filicudi, Alicudi, Salina and Panarea. The Islands were inscribed in the World Heritage list in 2000 as a natural site, giving an outstanding record of volcanic island-building and destruction, and ongoing volcanic phenomena. In the archipelago two active volcanos can be found, in the islands of Stromboli and Vulcano, and both Strombolian and Vulcanian type of eruptions can be observed (UNESCO 2014.)

Illustration 6: Island of Volcano, Aeolic Islands

Mount Etna, the latest Sicilian site to be included in the list in 2013, is the highest Mediterranean island mountain, the highest active volcano in Europe and the most active stratovolcano in the world. Located on the eastern coast of Sicily, it reaches 3343 m above sea level. The eruptive history of the volcano is thought to have begun about 500 000 years ago, of which 2700 are documented. Its almost continuous activity represent a valuable case study for geologists and volcanologists from all over the world. The World Heritage site includes the most protected and most important section of the volcano and it is part of the Etna Regional Nature Park (UNESCO 2014.)

Illustration 7: Mount Etna

3.5 Other major tourism attractions

Among other major tourism attractions of Sicily, at least two are worth of mention: Taormina and Scala dei Turchi. Taormina is a town located on the eastern coast between the cities of Messina and Catania, built up on a cliff on 206 m above level sea. The site was already inhabited by the Siculians when the Greek arrived in 753 BC. Taormina remained an important center during ancient times, being a popular holiday destination for Greek, Romans, Byzantines and Normans. However, it is possible to state that the modern tourism in the town started after 1870, when the Syracuse- Catania- Messina railway was completed. Another important even is marked by the inauguration in 1874 of the Timeo hotel, the first hotel built in Taormina. Over the years, the town has been visited by many artists, poets, writers, musicians (examples are J. W. Goethe, Richard Wagner, Salvador Dalì, Alexander Dumas, Francis Ford Coppola, etc.) who were charmed and inspired by the incredible views over the Mount Etna and the Mediterranean Sea and the magic atmosphere. The most popular attraction is undoubtedly the Greek- Roman amphitheater; moreover, the narrow medieval streets, the beautiful churches and the lively nightlife are also elements that contributed to its popularity among tourists (Comune di Taormina 2009.)

Illustration 8: View from the Greek theather of Taormina

Scala dei Turchi ("Stair of the Turks") is a rocky cliff located on the southern coast of Sicily, near Realmonte, and it lies between two sandy beaches. The name comes from the stair shape of the formation, made of white rocks, and it represents one of the main naturalistic attractions of the region (Comune di Realmonte 2014.)

Illustration 9: Scala dei Turchi

3.6   Analysis of Sicilian tourism industry

The tourism sector in Sicily nowadays constitutes one of the major sources of income for the region and it represents a strong, concrete boost for the economy; in a general economic situation of weakness of the last few years, the tourism sector is the only one showing clear signs of constant growth. Sicily is popular among tourists mainly as a summer destination as a "Sun- Sea- Sand" product for Italians, while foreign visitors prefer the cultural aspects of the vacation. According to Deandreis (2011), Sicily is the first of Southern Italian regions and the 7th in the whole country for number of foreign tourists with a market share of 37.3%, while the industry produces 2.6 billion euros in the regional GDP annually; furthermore, within the study for the creation of the "Rapporto sul settore turistico della Sicilia 2011" (Report on Sicilian tourism sector 2011), it has been calculated that every tourist's additional presence in the region generates 49 euros daily in the regional GDP. Nevertheless, in the Sicilian tourism sector it is difficult to identify an organized, concrete strategy which would allow a smoother cooperation among all the players of the industry, and among different sectors (e.g. transportation, accommodation) who end up operating autonomously in the tourism field (Iannì 2014.)

According to data from the Osservatorio Turistico della Regione Siciliana (Tourism Observatory of Sicilian Region) on tourism arrivals between 2003 and 2012, the numbers have been growing between 2003 and 2007, reaching its peak in 2006 for domestic tourists and in 2007 for foreigners; 2008-2009 saw a drastic collapse in the tourism flow due to the global economic breakdown. Since 2010, the sector started recovering with a growth rate of 3.6% between 2009 and 2010, 9.6% between 2010 and 2011 and 6.3% between 2011 and 2012 for international visitors, when it nearly reached the peak value again. On the other hand, domestic tourism is increasing slightly slower, with a growth rate of 2.8% between 2010 and 2011, and 0.4% between 2011 and 2012 (Osservatorio Turistico della Regione Siciliana 2013.)
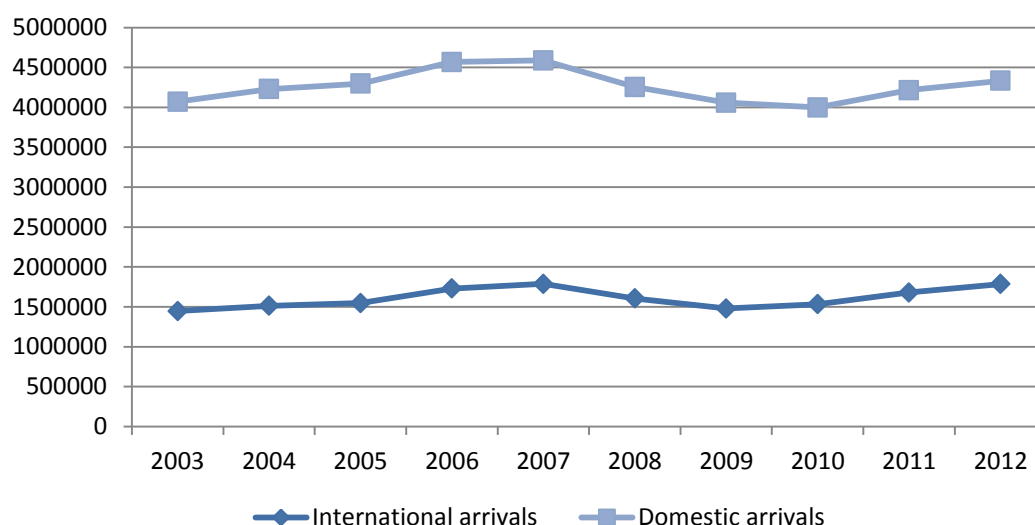
Tourism arrivals 2003- 2012

Figure 4: Tourism arrivals in Sicily 2003- 2012

(Data from Osservatorio Turistico della Regione Siciliana 2013)

Regarding the tourism arrivals in the Sicilian provinces (domestic and international), Figure 5 below shows as the main destinations are Palermo with 24% of arrivals (1 036 555), Messina with 20% (871 622) and Catania with 17% (734 532), out of 4 332 589 total arrivals in the island. The other provinces, especially the internal cities of Enna and Caltanissetta and Ragusa, present derisory percentages (Osservatorio Turistico della Regione Siciliana 2013, 28.)
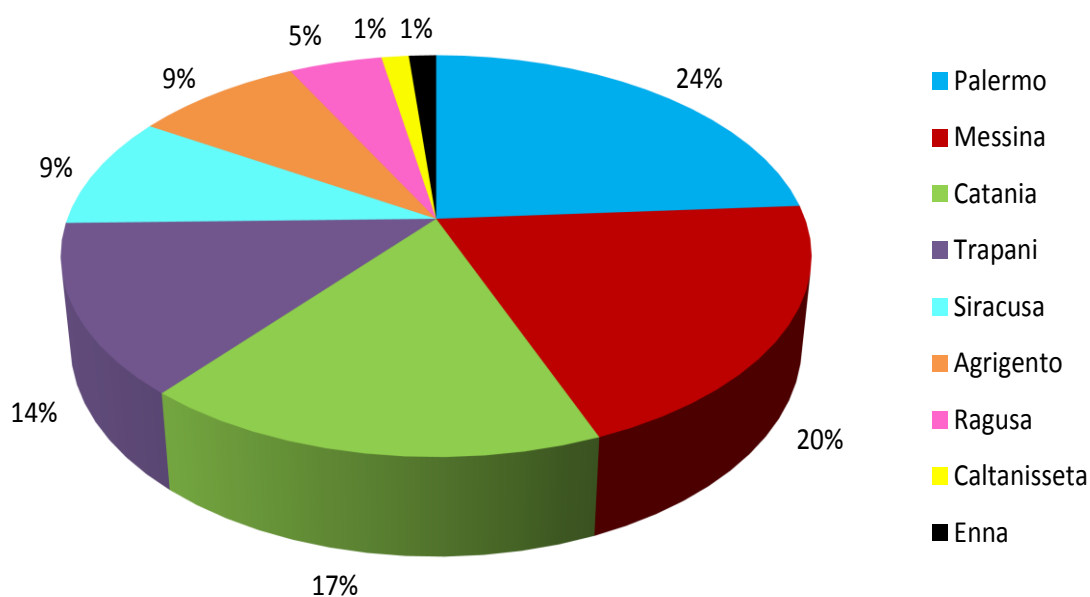
Figure 5: Tourism arrivals in 2012 in the Sicilian provinces

(Data from Osservatorio Turistico della Regione Siciliana 2013)

On the basis of data of 2012, the region has a total of 5 188 accommodation establishments, of which 1 363 hotels and 3 825 other types of accommodation, including b&b's, camping facilities and rented apartments. Among the hotel category, the majority are 3 stars (514 units) and 4 stars hotels (341). In other types of accommodation, b&b's prevail with 2 006 premises. Looking at the number of beds available, 127 256 are in hotel facilities (of which the majority is located in 4 stars hotels with 55 420 beds), while campings have the most beds in the other category (32 776), for a total of 201 772 in the whole island.

The total of beds available, including both hotels and other types of accommodations, is distributed in the provinces as the diagram below (Figure 5) indicates: the great majority are located in the province of Messina, representing 25% of the total (50 394); then follow Palermo with 19% (38 786) and Trapani in the third place with 14% with 28 906 beds (Osservatorio Turistico della Regione Siciliana 2013, 6-8, 27.)

Beds distribution

Enna 2%   Caltanissetta 2%

Trapani 14%

Agrigento 9%

Ragusa 8%
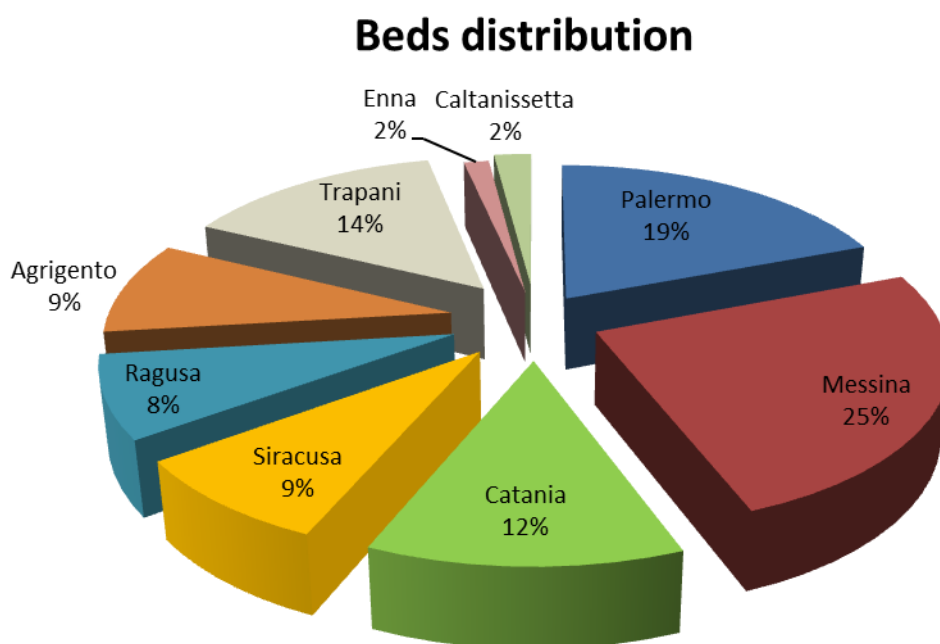
Siracusa 9%

Catania 12%

Palermo 19%

Messina 25%

Figure 6: Beds distribution in 2012 in Sicilian provinces
(Data from Osservatorio Turistico della Regione Siciliana 2013)

Regarding the flows of international tourists in 2012, the majority of them is represented by French visitors which reached a number of 345 693, attaining the first place in the ranking; other significant groups are tourists from Germany (293 413), United States (131 131) and United Kingdom (126 286). The ongoing growth of the number of Russians is also considerable, which increased 34.3% since the previous year, moving up from 46 240 to 62 114 people (Osservatorio Turistico della Regione Siciliana 2013, 30-31.)
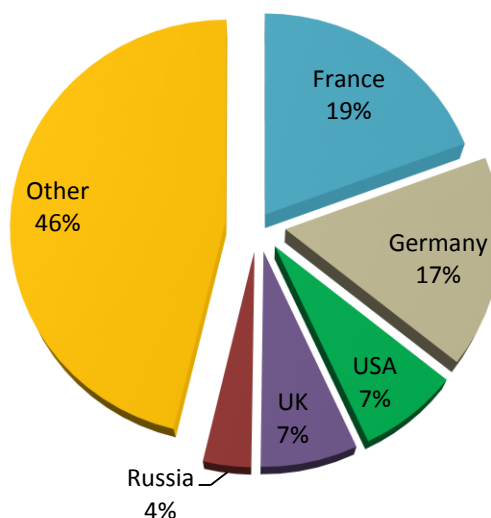
International tourists

Figure 7: International tourists in Sicily in 2012 by country of origin
(Data from Osservatorio Turistico della Regione Siciliana 2013)

In conclusion, it is possible to state that Sicily is reaching good performances in the tourism sector considering the overall economic situation of the region. The statistics show signs of recovery after the severe financial downturn of 2008-2009, with positive forecasts for the upcoming years. The region is provided with sufficient and diverse accommodation establishments, even though some provinces like Catania and Syracuse could do better seen the numbers of visitors. The major groups travelling to the island are represented by French and Germans, with growing interest of Russia and USA (Osservatorio Turistico della Regione Siciliana 2013, 30-31.)

4 The research

4.1 Data collection

For the purpose of exploring and analyzing the destination marketing of Sicily the qualitative research method has been used, in the form of a semi- structured interview with Mrs. Roberta Iannì from the Assessorato Siciliano del Turismo, Sport e Spettacolo (Sicilian Regional Tourism Board). The interview took place in the offices of the Tourism Board in Palermo on Wednesday 14th of May 2014, and lasted approximately one hour. The choice of relying on this type of method for the study subject was due to the fact that interviews allow to obtain deeper and more complete information than quantitative investigations. The topics covered during the interview were mainly the general situation of the tourism industry in Sicily, in order to get a broader picture of the context and, more specifically, the marketing strategies adopted by the Board, Social Media and E- Marketing, cooperation between public and private sector and destination branding. The complete list of questions used in the interview is attached to this thesis and it can be found in Appendix 1. The findings of the research are shown in the following chapter.

4.2 Analysis of marketing of Sicily

Despite Sicily's great potential, several gaps have been found in the big tourism machine, and one of the main problems can be found in the marketing ground. The tourism offer is essentially fragmented, and it is not easy to find information needed on the web, such as prices, itineraries, services, viability info, etc. Therefore, there is a strong need to create theme marketing actions and thematic packages, in order to satisfy the demands and expectations of the various tourism niches (e.g. Sport tourism, Cultural tourism, Religious tourism MICE, Gastronomic tourism), which are nowadays becoming more popular and substituting traditional tourism. Marketing actions undertaken by privates or DMOs are not yet successfully targeting the specific segments; in the Regional Tourism Board, the theme marketing strategy started in 2012, but it still needs to be implemented in a more functional way. Nevertheless, some initiatives have already been taken: in the Assessorato al Turismo Siciliano webpage several tours have been created on the basis of tourists' passions and preferences, offering a wide range of useful information and acting as a marketing tool, showing places and attractions that otherwise would remain unknown to most of the visitors (Iannì 2014; Piano Regionale di Propaganda Turistica 2014, 3-7.)
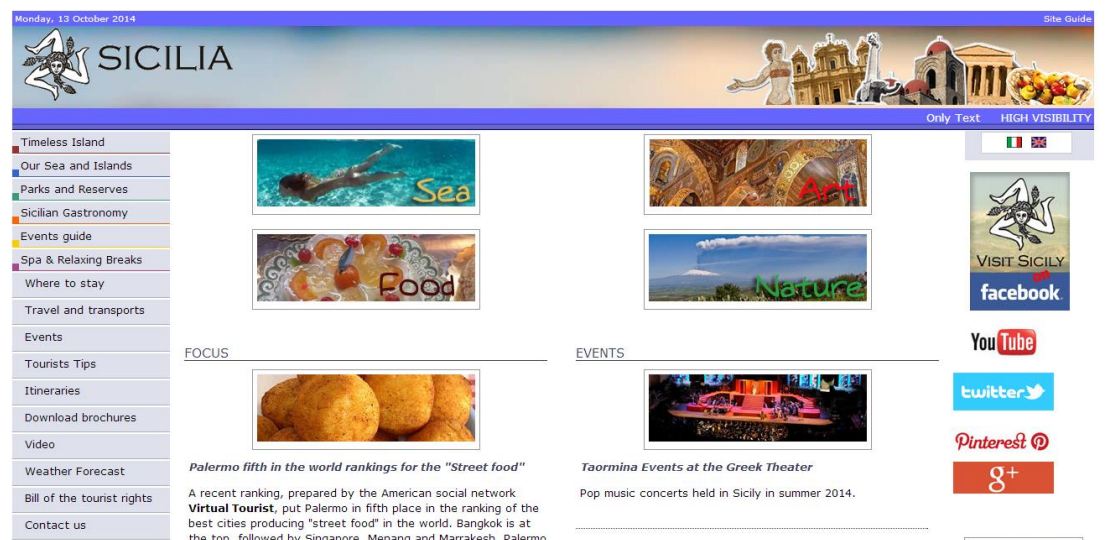
Figure 8: Thematic itineraries in the Sicily Tourism Board webpage

Furthermore the Osservatorio del Turismo, a body within the Sicilian Tourism Board, conducted a research in 2011 of the demand market, analyzing the economic situation, the main factors in the destination choice stage and the level of interest towards Sicily. The purpose of this study was to identify the main markets that the marketing actions and campaigns should focus on, and what are the niche or elements preferred abroad. The results confirmed that France, Germany and UK are the countries with major interest and will to travel to Sicily; other markets such as The Netherlands, Belgium, Austria, Switzerland, USA, Russia and Spain show a certain level of interest towards the destination, and they need actions of penetration of the market through an efficient promotion of the products. BRICS countries, except Russia, still show a low level of attention mainly due to difficulties and critical factors such as visa matters, connections to the island and low perception of Sicily as a destination; nonetheless, with their rapid and constant economic growth, they represent a remarkable potential market on which Sicily will undoubtedly focus its efforts in the future, especially in the case of China. As a practical initiative following the research, the Regional Tourism Board started a two year marketing campaign in those countries which gave major results, with the goal of promoting Sicily and strengthen its brand, through tv advertisements, press, web and billposting on the streets. The first part of the campaign lasted one year, being interrupted then for lack of funds. At the moment the marketing team is planning and organizing the second part of the campaign and studying the new scenarios, which in the meantime have changed (Piano Regionale di Propaganda Turistica 2013, 10- 95; Iannì 2014.)

Regarding E- Marketing, there is a strong awareness of the importance of the use of web and Social Media as marketing tools. To this scope, the Regional Tourism board has made agreements and worked in cooperation with Trip Advisor and Turisti per Caso, the blog of a famous italian travel tv program; a Facebook page and a Twitter account (Visit Sicily) are operating,

showing notable quantity of material (photo, videos) and information about the attractions, destinations and events in the island. Especially the Facebook page, with nearly 276 000 likes, proves the popularity of Sicily among web users, being the 2nd destination page in Italy after Tuscany. Moreover, the Board marketing experts have also been using Google trends as a tool to study the consumers' behavior and the weight of Sicily's brand through the analysis of the frequency and mode of keywords research in web engines. Unbelievably though, there is still no specific Social Media team within the Board, and the workers update the pages while attending other tasks, during their free time or from home. This among other things, shows the contradictory nature of the Sicilian situation.

In order to deepen the subject and educate the professionals of the field, two meetings have been held in Palermo and Catania in June 2012 about the theme "What and how tourists search online". The seminars saw the participation of experts and guests from Google, Trip Advisor, marketing specialists and lecturer Mr. Robert Piattelli from BTO Educational (Buy Tourism Online). Objects of discussion were case studies and travel agencies who have followed the trend and have renewed themselves (Iannì 2014.)

Figure 9: Visit Sicily Facebook page

Sicily's brand is strong in the idea that tourists have of the island, especially as far as it concerns sea, climate and culture, making of it a destination well known abroad. However, there is still a need for strengthening and developing the image even more, targeting those markets or groups who are still not aware of the product. One of the biggest challenges in achieving this goal of a consistent and famous brand is represented by the fragmentation of the local DMOs which have the role of organizing the tourism offer. The slogan, which covers a fundamental role in the discovery of the identity of the destination, has been changed several times over the years together with the promotional video, examples being "Sicilia: Mito in

un'isola di luce" (Sicily: Myth in an island of light) and the new one "Intensamente Sicilia" (Intensely Sicily). One of the main and most successful measures taken in order to achieve this purpose is the competitor analysis: a careful investigation into the competitors' strengths, their strategies, their marketing actions, from whom taking example and afterwards create a tailor made plan for Sicily (Iannì 2014.)

The Sicilian Tourism Board and, more precisely, the marketing department, are fully aware of the gaps and weaknesses of their system and policies, for this they have already started some initiatives aimed at improving the level of promotion and knowledge of Sicily. Among the ones who gave major results, are worthy of mention the educational tours organized for foreign tour operators, who were invited to Sicily to get to know the products and destinations. The tours were combined with meetings and workshops with Sicilian tour operators, in order to facilitate networking, exchange of opinions, negotiations and cooperation. In addition to that, the participation to national and international tourism and travel fairs has always been one of the focal points of Sicily's campaign; examples are the 2013 World Travel Market (WTM) in London, which saw a noteworthy demand for tours in Montalbano movies locations – which indicates a growth of the Film tourism in the island – and the ITB in Berlin in 2014. The Board has also been present in conventions organized in the USA and Asia, and so it is planned for the upcoming years (Iannì 2014.)

Finally, actions of co- marketing are planned in partnership with airlines and airports, with the scope of "reducing the distances" from the main European cities, facilitating the access to the island and consolidating the air traffic. These efforts will include an increase of the number of direct flights from low-cost companies to and from Sicily, incentivizing the trend of the short city breaks; another option is to stipulate agreements with the Sicilian airports in order to lower the costs of airport taxes (Piano Regionale di Propaganda Turistica 2013, 110.)

5   Conclusions

Sicily represents a well-known destination and brand abroad. The tourism industry generates 2.6 billion euros in the regional GDP annually, representing the major economic drive in the island. In spite of the general context of its fragile economic situation, Sicily has achieved good levels in the sector; with a great offer of different tourism products – cultural heritage, art, film industry, nature and beautiful landscapes, religious festivals and architecture- good choice of accommodations establishments and a constant growth in the arrivals numbers that show a recovery from the financial recession of 2009, the projections for this sector can be optimistic. Nevertheless, if compared to other Italian regions, it is clear that a lot still needs to be done. Many are the internal weaknesses that damage the success of tourism on the island, namely the difficult connections to the main European cities and the lack of an organized and structured tourism offer; in other cases the problems are structural in the sense of basic infrastructures such as rail systems and roads, especially in the internal area. The policies aiming at the development of the industry, funded by the European Union, have not generated the results planned, but often the tourism professionals are those who show a lack of awareness or knowledge of the potentialities of the territory, while these resources could be used in a modern and efficient way, in order to take advantage of the immeasurable assets of the island.

Some ideas could be relying on de-seasonality actions, organizing and hosting events and initiative of re-discovery of the region even during the low season months, in order to attract visitors. Another option, and maybe the most promising, is the segmentation of the tourism offer into specific thematic tours and journeys, following the new trend of niche tourism targeted at specific groups of travelers. This measure could represent the perfect opportunity for Sicily to promote not only its most popular features such as the rich cultural heritage, the archaeologic sites and the sea holidays, elements for which it is mostly famous, but also other less explored aspects, e.g. the eno- gastronomic sector or the numerous thermal facilities. Among the measures already taken, are the educational and press tours which give the opportunity to local and foreign stakeholders to cooperate and share information on the topic.

Analyzing Sicily through the 4 P's model of the marketing mix, it can be seen that, as already mentioned earlier, the region has a good variety of tourism products to offer, including ancillary services and other amenities, such as entertainment parks and shopping centers. The prices of the packages and transportations are, on the other hand, quite high, especially if compared to similar destinations such as Balearic Islands and Greece, which constitute the main competitors of Sicily. This represents a weakness that should lead the region to differentiate itself from others. The distribution channels (Place) used to sell the products should also adjust to the constant development of new technologies, as well as the promotion/ mar-

keting channels, which is probably the area where the major gaps can be found. Despite the awareness of the big role of E- Marketing and Social Media Marketing, the Regional Tourism Board has not formed yet a Social Media team, able to update the webpage and Social Media pages in a more systematic and regular way.

Other initiatives which will benefit tourism in the region are the implementation of co-marketing with Sicilian airports and low-cost airline companies, in order to guarantee an easier and more affordable access to the island, giving the possibility to compete with similar destinations, or a better cooperation with other EU countries and better use of financial resources, in order to restart the marketing campaigns abroad.

In conclusion, the study shows that Sicily is a territory full of resources and potential, although not exploited to the fullest. Especially in the marketing area, considerable efforts still need to be made in order to bring up the destination to the same level of its major international competitors. Regardless, a significant number of initiatives has been planned or undertaken to reach this objective, and the future scenarios seem positive.

References

American Marketing Association. 2014. Definition of Marketing. Accessed 27.04.2014.
https://www.ama.org/AboutAMA/Pages/Definition-of-Marketing.aspx

Association of Destination Management Executives International. 2014. What is a DMC? Accessed 01.05.2014. http://www.adme.org/dmc/what-is-a-dmc.asp

Beritelli, P., Bieger, T. & Laesser, C. 2007. Destination governance: using corporate governance theories as a foundation for effective destination management. Journal of Travel Research, 46, August, 96-107.

Buhalis, D. 2000. Marketing the competitive destination of the future. Tourism Management Special Issue: The Competitive Destination. Accessed 27.04.2014.
http://epubs.surrey.ac.uk/1087/1/fulltext.pdf

Clark, G. & Maric, V. 2013. Lonely Planet: Sicily. Lonely Planet Publications. Accessed 03.04.2014.
http://books.google.it/books?id=HaNWAgAAQBAJ&pg=PT58&dq=Sicily+world+heritage+sites&hl=it&sa=X&ei=qV_lUqmqPOGD4ASe7oHoDw&ved=0CFcQ6AEwBA#v=onepage&q=Sicily%20world%20heritage%20sites&f=false

Comune di Realmonte. 2014. Scala dei Turchi. Accessed 16.10.2014.
http://www.comune.realmonte.ag.it/index.php?option=com_content&view=article&id=17:scala-dei-turchi&catid=1:bellezze-naturalistiche&Itemid=17

Comune di Taormina. 2009. Turismo. Accessed 16.10.2014.
http://www.comune.taormina.me.it/eventi/

Darwin P. & Danforth P. 2009. Frommer's Sicily. Hoboken: Wiley Publishing. Accessed 06.04.2014.
http://books.google.fi/books?id=vZDLw0nOnfsC&pg=PA52&dq=sicily+tourism&hl=it&sa=X&ei=lnVBU8GlGIXNygOf34LgDA&redir_esc=y#v=onepage&q&f=false

Deandreis, M. 2011. Rapporto sul settore turistico della Sicilia 2011. Accessed 07.04.2014.
http://www.sr-m.it/images/stories/allegati/turismo_sicilia_1luglio.pdf

Kotler, P., Wong V. & Armstrong, G. 1996. Principles of Marketing - European Edition. Prentice-Hall.

Kozak, M., Gnoth, J. & Andreu, L. 2010. Advances in Tourism Destination Marketing: Managing Networks. Abingdon: Routledge.

Maric, V. 2008. Lonely Planet: Sicily. Lonely Planet Publications. Accessed 02.04.2014.
http://books.google.it/books?id=G2lJJZdUqwwC&pg=PA22&dq=Sicily+world+heritage+sites&hl=it&sa=X&ei=qV_lUqmqPOGD4ASe7oHoDw&ved=0CD0Q6AEwAA#v=onepage&q=Sicily%20world%20heritage%20sites&f=false

Matias, A., Nijkamp, P. & Sarmento, M. 2011. Tourism Economics: Impact Analysis. Springer-Verlag Berlin Heidelberg. Accessed 06.04.2014.
http://books.google.fi/books?id=vzcufw6qcCoC&pg=PA269&dq=sicily+tourism&hl=it&sa=X&ei=lnVBU8GlGIXNygOf34LgDA&redir_esc=y#v=onepage&q&f=false

Mill, R. & Morrison, A. 1992. The tourism system: An introductory Text (2nd ed.). Englewood Cliffs, NJ: Prentice Hall.

Morrison, A. 2013. Marketing and Managing Tourism Destinations. Oxon: Routledge. Accessed 28.04.2014.

http://books.google.fi/books?id=JERGAgAAQBAJ&pg=PA9&dq=Tourism+marketing+definition&hl=it&sa=X&ei=mUdeU5f4JonpygOHu4Aw&redir_esc=y#v=onepage&q&f=false

Osservatorio Turistico della Regione Siciliana. 2013. Il turismo in Sicilia 2011- 2012. Accessed 08.04.2014.
http://pti.regione.sicilia.it/portal/page/portal/PIR_PORTALE/PIR_LaStrutturaRegionale/PIR_TurismoSportSpettacolo/PIR_Turismo/PIR_6584964.046479105/Il%20Turismo%20in%20Sicilia%20-%20Rapporto%202011-12.pdf

Pike, S. 2008. Destination Marketing. An integrated marketing communication approach. UK: Butterworth-Heinemann.

Pride, W. & Ferrell, O. 2006. Marketing. Boston: Houghton Mifflin. Accessed 27.04.2014.
http://books.google.fi/books?id=uq1hI9VHBpoC&printsec=frontcover&dq=marketing&hl=it&sa=X&ei=Eq2PUsCcGqni4QTv4YHYCw&ved=0CEMQ6AEwBA#v=onepage&q&f=false

Regione Siciliana. 2011. Climate. Accessed 03.04.2014.
http://pti.regione.sicilia.it/portal/page/portal/SIT_PORTALE/SIT_EnglishVersion/Turists%20Tips/Climate

Regione Siciliana. 2011. Geography. Accessed 03.04.2014.
http://pti.regione.sicilia.it/portal/page/portal/SIT_PORTALE/SIT_EnglishVersion/Turists%20Tips/Geography

Regione Siciliana. 2011. History of Sicily. Accessed 02.04.2014.
http://pti.regione.sicilia.it/portal/page/portal/SIT_PORTALE/SIT_EnglishVersion/Turists%20Tips/History

Regione Siciliana. Assessorato del Turismo dello Sport e dello Spettacolo. 2014. Piano Regionale di Propaganda Turistica 2014.

Regione Siciliana. Assessorato del Turismo dello Sport e dello Spettacolo. 2013. Piano Regionale di Propaganda Turistica 2013.

UNESCO. 2014. Aeolian Islands. Accessed 11.10.2014. http://whc.unesco.org/en/list/908

UNESCO. 2014. Archaeological Area of Agrigento. Accessed 11.10.2014.
http://whc.unesco.org/en/list/831

UNESCO. 2014. Late Baroque town of the Val di Noto. Accessed 11.10.2014.
http://whc.unesco.org/en/list/1024

UNESCO. 2014. Mount Etna. Accessed 11.10.2014. http://whc.unesco.org/en/list/1427

UNESCO. 2014. Syracuse and the Rocky necropolis of Pantalica. Accessed 11.10.2014.
http://whc.unesco.org/en/list/1200

UNESCO. 2014. Villa Romana del Casale. Accessed 11.10.2014.
http://whc.unesco.org/en/list/832

UNWTO. 2007. A Practical Guide to Tourism Destination Management. Madrid: WTO. Accessed 01.05.2014.
http://www.tdmszovetseg.eu/files/_tdmsz/download_files/12/unwto_practicalguide.pdf

UNWTO. 2014. Tourism Highlights, 2014 Edition. Madrid: WTO. Accessed 17.10.2014.
http://dtxtq4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_highlights14_en_hr_0.pdf

UNWTO. 2014. Understanding Tourism: Basic Glossary. Accessed 27.04.2014.
http://media.unwto.org/content/understanding-tourism-basic-glossary

UNWTO and ETC. 2009. Handbook on Tourism Destination Branding. UNWTO and ETC.

Wang, Y. & Pizam, A. (eds.) 2011. Destination Marketing and Management: Theories and Applications. UK: CAB International. Accessed 28.04.2014.
http://books.google.fi/books?id=wfkDgc4KnOMC&pg=PA1&dq=destination+marketing+definition&hl=it&sa=X&ei=9GFeU_DRGon5yAOQhYH4CA&redir_esc=y#v=onepage&q=destination%20marketing%20definition&f=false

Unpublished sources

Iannì, R. 2014. Personal Interview.

Illustrations

Figures

Tables

Appendix 1: Interview with Roberta Iannì- Regional Tourism Board

Questions:

1. As an expert of the field, what is your opinion about the current situation of Sicilian tourism industry?
2. What are the strengths of Sicily as a destination?
3. What are the major gaps in Sicily's tourism? How can those be overcome?
4. What is the current marketing strategy that the Regional Tourism Board is using to promote Sicily abroad? How it is implemented in practice? Can you give any examples of recent marketing campaigns?
5. What is your opinion about the use of Social Media as marketing tools? How important Facebook is for your marketing efforts? Who updates the page and how often?
6. On which aspects should Sicily focus in order to create a strong brand for the island?