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SOCIAL MEDIA in the TOURISM INDUSTRY

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Claudia Fraboni 2018

This work is dedicated to my son Michelangelo,
my sweet little turtle.
I hope you may be inspired by my study.

"*Education is the most powerful weapon which you can use to change the world*".

Nelson Mandela

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INTRODUCTION

1. Abstract

The advances in Information and Communication technologies (ICT) and the phenomenal success in terms of adoption and usage levels of social media by the global society in the last decades, have caused paradigm shifts in how people connect and communicate with each other, how they express and share ideas, and even how they engage with products, brands, and organizations. In travel and tourism, the impact of social media has been even more extraordinary, bringing unprecedented opportunities and challenges, primarily due to the experiential nature of tourism products. The combined sector of travel and accommodation is heavily ICT dependent (Buhalis and Licata, 2002). Tourists are connected at each stage of travel and seek real time interaction with tourism suppliers 24 hours a day, seven days a week. A strong social media presence is, therefore, increasingly critical for tourism suppliers. This is true for both business to consumer companies such as hospitality firms, which need to directly and instantly interface with their customers, and also business to business companies, such as tour operators, since the disintermediation of the tourism supply chain has shortened the distance between the travel suppliers and tourists and the need to be connected is on the rise. Moreover, customer pressure has a strong influence on e-communication practices through travel agencies. The aim of this thesis is to observe the state-of-play of social media usage and knowledge by two opposite sides of the tourism supply chain. A predominantly BtoB industry (tour operators) and a BtoC industry (hospitality). A literature review research and an empirical research for each of the industries have been conducted. The results of the systematic reviews assess the need for further and deeper research on social media issues in the Hospitality business and, even more, in the Tour Operator Industry. The findings of the empirical researches indicate that tourism suppliers, both TO and hospitality firms, are generally lagging behind in social media integration and their perception of the positive impacts of its usage is still low. Managerial implications and recomendations for future research are provided.

Keywords

Tourism, travel, tour operator, hospitality, accomodation, ICT, social media, social media marketing

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1.1 Introduction

The advances in Information and Communication technologies (ICT) and the phenomenal success in terms of adoption and usage levels of social media (SM) by the global society in the last decades, caused paradigm shifts In how people connect and communicate with each other, how they express and share ideas, and even how they engage with products, brands, and organizations. Thanks to the new hardware and software technologies (mobile devices, wi-fi connection, apps), communication is now instant, real time, accessible everywhere and available 24 hours a day and 7 days a week. The internet, providing channels that contribute to the interactions and transactions between consumers and businesses (Gay et al. 2007), has drammaticaly changed the market rules. Netizens participate very actively in emerging technologies, so they have moved from being CONsumers to PROsumers (Toffler 1990)[1] and according to Axel Bruns even PROusers[2], with far more influence than ever before, contributing not just the money but market and design information, knowledge and ideas through User Generated Content (UGC).

The ICT and social media revolution has been so favourably welcomed by the global society, that it reached such a massive diffusion that would have been hard to be imagined at the beginning. So hard to be foreseen and so fast moving that many industries on the other hand are still working to catch up with this megatrend,

This study will focus on the impact of social media on the supply side, in particular on the Tourism Industry, where the impacts of ICTs have been even more extraordinary, bringing unprecedented opportunities and challenges, primarily due to the experiential

[1] The term “prosumer” has been first used by Toffler in 1980 but in today’s world of the social web the term has transformed from meaning “professional consumer” to meaning “product and brand advocate.” Rather than simply “consuming” products, people are becoming the voices of those products and significantly impacting the success or failure of companies, products, and brands, particularly through their involvement on the social web. No longer are businesses completely in control of their products, brands and messages. The leaders of this shift are the members of the social web — bloggers, forum posters, social networking participants, and so on, who spread messages, influence people around the world, and drive demand.

[2] According to Axel Bruns users are also as producers that put their User Generate Content (UGC) and ideas free on social media independently by their own motivation and desire (Bruns, 2006).

nature of tourism products. In the present work we will try to understand the state-of-play and the awareness of the importance of a social media presence for the hospitality and tour operator companies. The decision to analyse this two particular kind of businesses of the Tourism industry, was given by the interest in observing the different behaviours, in terms of social media implementation, of business to consumer companies (hospitality) and business to business ones (tour operators) along the same supply chain.

The existing literature on the matter has been first analyzed to find possible gaps of research. Chapter 2 is dedicated to a systematic review of the exant literature concerning the impact of social media on the Hospitality Industry, while chapter 4 is focusing on literature concerning the impact of ICTs on a BtoB sector, i.e. the Tour Operators industry. The research questions for both reviews are the followings:

- Do hospitality companies and tour operators use social media?
- Which is their perception of social media?
- Which is the impact of social media on the hospitality businesses and tour operators?

The results of the above systematic reviews revealed a general lack of research on the use of social media by tourism providers. Thus, two different empirical researches have been carried out on each of the target industries. The one on the impact of social media on hospitality Industry (Chapter 3) is based on a questionnaire submitted to the Hospitality businesses of the Italian Medium Adriatic Regions (Emilia Romagna, Marche and Abruzzo). The other (Chapter 5), which focuses on the impact of social media on the Tour operators Industry is based on the observation of the social media activity of some of the Italian Tour Operators.

The main objective of both empirical researches is to understand to what extent hospitality managers and tour operators are using social media.

In this first chapter, which introduces the whole study, we will go deeper into the social media phenomenon, trying to describe it (Paragraph 1.2) and to figure out the scale and extent of it both in the society and economy (Paragraph 1.3).

The final chapter will then, draw conclusions on the tourism industry relationship with social media and try to suggest broader managerial implications for the hospitality and travel suppliers in their connection with the "social" customers.

1.2 Social media definition and classification

1.2.1 Social media

The variety of social media is so large, countless and fast evolving that it introduces a tough challenge of definition. As Jacka and Scott (2011) argue, "there is no single recognized definition of social media". Kaplan and Haenlein (2010), also note that the development of a systematic classification scheme for social media can be difficult, as new sites appear every day. Whenever wide and all-encompassing a definition may be, social media have evolved to include other tools and practices that were not conceived of only a few years or even a few months ago.

Wikipedia[3], being part of the world, defines Social media as "interactive computer-mediated technologies that facilitate the creation and sharing of information, ideas, career interests and other forms of expression via virtual communities and networks"[4]. The Wiki, combining different scholars' definitions, recognizes some common features:

1. Social media are interactive **Web 2.0** Internet-based applications.
2. **User-generated content**, such as text posts or comments, digital photos or videos, and data generated through all online interactions, is the lifeblood of social media.
3. Users create service-specific profiles for the website or app that are designed and maintained by the social media organization.
4. Social media facilitate the development of online **social networks** by connecting a user's profile with those of other individuals or groups.

In a further attempt to give an exhaustive definition of social media, being fully aware that it may not be the most complete and ultimate one, some scholars' contributions should be taken into consideration. For instance, other and different characteristics have been recognised by Khan (2015) as being common to all social media: many-to-many,

[3] Available at: <https://en.wikipedia.org/wiki/Social_media> [Accessed September 2018]

[4] Kietzmann, Jan H.; Kristopher Hermkens (2011). "Social media? Get serious! Understanding the functional building blocks of social media". Buettner (2016), similarly, defines Social media as "a computer-mediated tool that allow people to create, share or exchange information, career interests, ideas, and pictures/videos in virtual communities and networks".

participatory, user owned, conversational, openness, mass collaboration, relationship oriented, and free and easy to use. Khan contends that there are two types of social media: the ones that are static, and the ones that are dynamic (reaction in real time).

Similarly, Mayfield (2008) envisoned some features shared by most or all SM: *Participation*: social media encourages contributions and feedback from everyone who is interested. it blurs the line between media and audience. *Openness*: most social media services are open to feedback and participation. They encourage voting, comments and the sharing of information. there are rarely any barriers to accessing and making use of content. *ConVersation:* whereas traditional media is about “broadcast” (content transmitted or distributed to an audience) social media is better seen as a two-way conversation. *Community*: social media allows communities to form quickly and communicate effectively. Inside the communities people share common interests, political issues etc. *Connectedness*: most kinds of social media thrive on their connectedness, making use of links to other sites, resources and people.

According to Ward (2010), social media is one type of online media accelerating communication like conversation in contrast with conventional media which doesn’t allow readers to participate in the creation of contents. Social media differ from traditional media in many ways, including quality, reach, frequency, usability, immediacy and permanence (Agichtein et al., 2008). Social media operates in a dialogic transmission system, many sources to many receivers (Pavlik and MacIntoch, 2015). This is in contrast to traditional media that operates under a monologic transmission model (one source to many receivers).

Furthermore, social media depends on mobile and web-based technologies to create highly interactive platforms through which individuals and communities share, co-create, discuss, and modify user-generated content. It introduces substantial and pervasive changes to communication between businesses, organizations, communities, and individuals (Kietzmann & Hermkens, 2011). Jacka and Scott (2011) offered their definition, contending that "social media is the set of Web-based broadcast technologies that enable the democratization of content, giving people the ability to emerge from consumers of content to publishers". Safko and Brake (2009) describe the phenomenon as a social media eco-system. This recognises that social media do not represent a uniform species of technology applications but rather a multitude of channels and platforms that are interlinked and perform different functions.

Kaplan and Haenlein (2010) assessed that social media as we know it today can be traced back more than two decades when users could already post public messages on sites such as Usenet[5]. The advent and availability of high-speed internet access has then led to a proliferation of sites and an explosion in their popularity (Kaplan and Haenlein 2010).

The two scholars developed their own technical definition of social media: "social media is a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of user generated content".

Web 2.0 is described "as a platform whereby content and applications are no longer created and published by individuals, but instead are continuously modified by all users in a participatory and collaborative fashion". So, Web 2.0 might be seen as the ideological and technological foundation of social media. The mere publishing of content is less interactive and belongs to the earlier Web 1.0 era; collaborative projects, starting with blogs, belong to Web 2.0 (Kaplan and Haenlein 2010). Web 3.0, the Semantic Web, is the expected next stage. First envisioned by Tim Berners-Lee in 2006, this third iteration of the Web makes it possible for people and machines to collaborate[6].

User-generated content (UGC) or **User Created Content** (UCC) describes the various forms of media content that are created by and available to users. Kaplan and Haenlein (2010) go further and adopt the view of the OECD[7] that content must meet three basic requirements to qualify as UGC:

- It must be published to all Web users or to a select group (which might exclude emails

[5] Usenet is a worldwide distributed discussion system first established in 1980. Users read and post messages (called *articles* or *posts*, and collectively termed *news*) to one or more categories, known as newsgroups. Usenet resembles a bulletin board system (BBS) in many respects and is the precursor to Internet forums that are widely used today. Source: < https://en.wikipedia.org/wiki/Usenet> [Accessed: September 2018]

[6] The Web will be a universal medium for data, information, and knowledge exchange. It will mark an era of collaboration of people, but also of people and machines. While some elements of Web 3.0 exist, especially the presence of services made possible by social software, the capture of user-generated data, and the mining and processing of big data, it is not yet fully realized. We remain in a stage known as Web 2.x. Shadbolt N., Hall W. and Berners-Lee T. (2006), "The Semantic Web Revisited," IEEE Intelligent Systems 96-101

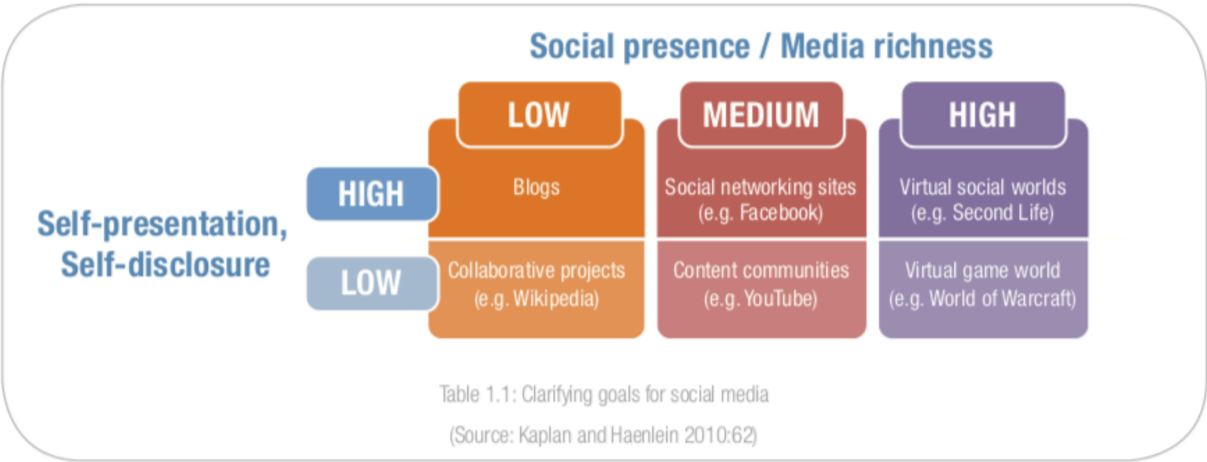
[7] Organisation for Economic Co-operation and Development (2007) Working Party on the Information Economy PARTICIPATIVE WEB: USER-CREATED CONTENT DSTI/ICCP/IE(2006)7/FINAL Available at: <https://www.oecd.org/sti/38393115.pdf> [Accessed: May 2018]. In 2007 the OECD asserted that: "There is no widely accepted definition of UCC, and measuring its social, cultural and economic impacts are in the early stages". UCC is defined as: "i) content made publicly available over the Internet, ii) which reflects a certain amount of creative effortî, and iii) which is icreated outside of professional routines and practices".

or instant messages).

- It should demonstrate some creative effort and not simply replicate the work of another.
- It must be created outside of professional routines and practices and not for a commercial market.

Although UGC was available before Web 2.0 emerged, the combination of technology, economics (wider access to the tools of creation) and social influences (the rise of a generation of "digital natives" and "screenagers") has driven its development (Kaplan and Haenlein 2010). The two scholars further contend that social media have two key elements that can be used to classify them to some extent: social presence/media richness on the one hand, and self-presentation/self-disclosure on the other (Fig. 1.1).

Fig. 1. 1 Social media classification by Kaplan and Haenlein (2010)



The table shows how different types of social media involve different commitments from the user. It is important to recognize that the term social media encompasses a large array of specific types of media. Accordingly Kaplan and Haenlein suggest a categorisation:

Collaborative projects enable the joint and simultaneous creation of content by many users. Examples include various ‘wikis’, such as Wikipedia. Some of these sites allow users to add, remove and change content; others are a form of ‘social bookmarking’, in that they allow the group-based collection and rating of internet links or media content.

Blogs the earliest form of social media, grew from personal web pages and usually display date-stamped entries in reverse chronological order. Text-based varieties are still very popular.

Content communities have as their main purpose the sharing of media content between users, including text (e.g. Bookcrossing), photographs (Flickr), videos (YouTube) and PowerPoint presentations (SlideShare). Users are not usually required to create a personal profile page.

Social networking sites (SNS) allow users to connect by creating personal information profiles and inviting friends and colleagues to have access to the profile and to send emails and instant messages. Profiles usually include photographs, videos, audio files, blogs and so on. Facebook and Myspace are examples of social networking sites.

Virtual game worlds are platforms that replicate a three-dimensional environment in which users appear in the form of personalised avatars and interact according to the rules of the game. They have gained popularity with the support of devices such as Microsoft's XBox and Sony's PlayStation. An example is World of Warcraft.

Virtual social worlds allow inhabitants to choose behaviour more freely and to live (in the form of avatars) in a virtual world similar to their real life. An example is Second Life.

Many authors have proposed different categorizations and each of them may classify social media in slightly different ways. For instance, the Wiki *Wikipedia* is to be included in the collaborative projects according to Kaplan and Haenlein, whereas it goes under content aggregators, i.e. applications that allow people to customize the content as they wish to, according to Lehtimäki et al. (2009). What matters to the purpose of this study is to give an idea of what will be discussed in the next chapters.

A definition by Boyd and Ellison (2008) expands on the definition of **social networking sites (SNS)**: "web-based services that allow individuals to 1) construct a public or semi-public profile within a bounded system, 2) articulate a list of other users with whom they share a connection, and 3) view and traverse their list of connections and those made by others within the system. The nature and nomenclature of these connections may vary from site to site". Social Networking Sites also vary with the security settings users set for their profiles, which then differently allow others to access the profile and the material they have posted to the site. Social networking sites might seem a recent innovation, but there is plenty of evidence to the contrary. Dating sites are, for instance, sometimes considered the first social networks[8]. In any case, *SixDegrees,* launched in 1997, is widely recognised as being the first modern social network[9].

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[8] The first dating sites cropped up as soon as people started going online. They allowed users to create profiles (usually with photos) and to contact other users but rarely allowed to keep a friends list.

[9] Six Degrees allowed users to create a profile and to become friends with other users. While the site is no longer functional, at one time it was actually quite popular and had around a million members at its peak.

A very useful infographic by the american art director Isabella Kinkelaar[10] Fig. 1.2) gives a clear idea of the most common and widespread Social Networking Sites landscape today, of their characteristics and of the best ways for corporations to take advantage of these. As everything that concerns the fast moving and ever changing world of social media and ICTs, this map may become out of date in less than a while, but I found it useful to observe the social networking sites panorama at a glance and to unravel the tangled mess about which SNS does what.

Fig. 1. 2 Social Media Networks Infographic

To conclude this, which is certainly not the most complete review possible of social media definitions and categorisations, I may not forget to mention Tuten and Solomon theories which have been adopted as a Framework for the whole study. According to the authors: "Social media are the online means of communication, conveyance, collaboration, and cultivation among interconnected and interdependent networks of people, communities,

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Wikipedia offers an interesting Timeline of social media available at: <https://en.wikipedia.org/wiki/Timeline_of_social_media > [Accessed: August 2018]

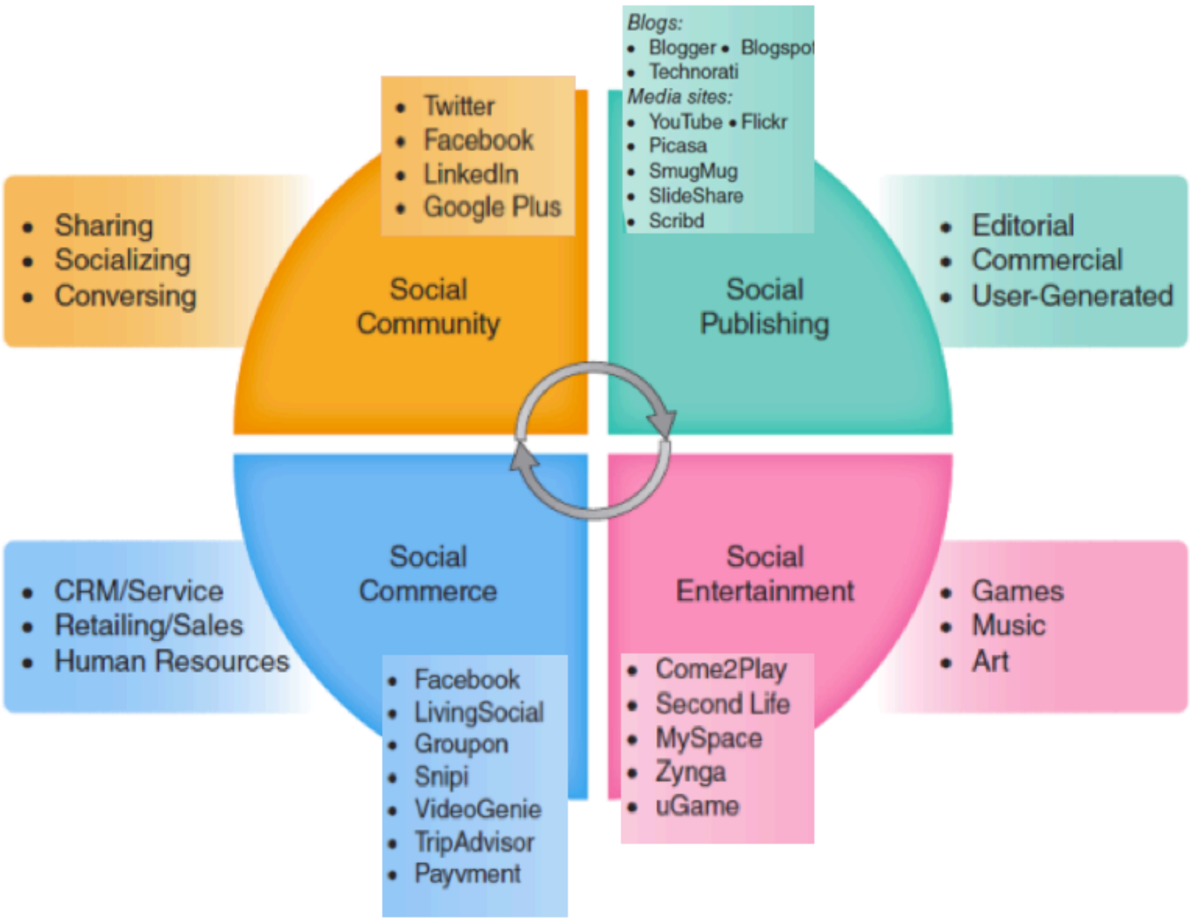
[10] Available at: < http://www.isabellakinkelaar.com/#/social-media-infographic/> [Accessed: August 2018]

and organizations enhanced by technological capabilities and mobility".

Social media are socially enabled online channels, and like other media, there are numerous vehicles within each channel. Part of the complexity of social media is due to the sheer quantity of channels and vehicles, with new ones coming online all the time.

Tuten and Solomon (2015) tried to organize the social media space grouping similar channels into four zones (Fig. 1.3) The four zones focus upon the most important functions of each social media platform. Some areas overlap two or even more zones.

Fig. 1. 3 Zones of Social Media and exemplar vehicles



Social communities describe channels of social media that focus upon *relationships* and the common activities people participate in with others who share the same interest or identification. They feature two-way and multi-way communication, conversation, collaboration, and the sharing of experiences and resources. All social media channels are built around networked relationships, The channels in the social community zone include social network sites, message boards and forums, and wikis. All emphasize individual contributions in the context of a community, communication and conversation, and collaboration.

Social publishing is the production and issuance of content for distribution via social publishing sites. These aid in the dissemination of content to an audience by hosting content while also enabling audience participation and sharing. Social publishers may be categorized into four use groups: 1) individual users, 2) independent professionals, 3) professional contributors associated with organizations such as news media, and 4) brands. The channels of social publishing include blogs, microsharing sites, media sharing sites, and social bookmarking and news sites. These enable participation and sharing, just as social communities do. The distinction between these two zones is in the primary orientation. The orientation of social communities is networking while that of social publishing is knowledge-sharing.

The **social entertainment** zone encompasses events, performances, and activities designed to provide the audience with pleasure and enjoyment, experienced and shared using social media. The distinction between the zones of social publishing and social entertainment is the orientation: Knowledge-sharing versus entertainment-sharing. Social games are, at this stage, the most advanced channel in the social entertainment zone. Examples of social game vehicles include Candy Crush and Mafia Wars.

The **social commerce** zone refers to the use of social media in the online shopping, buying, and selling of products and services. Social commerce encompasses social shopping, social marketplaces, and hybrid channels and tools that enable shared participation in a buying decision. Social shopping is the active participation and influence of others on a consumer's decision-making process, typically in the form of opinions, recommendations, and experiences shared via social media. Channels include reviews and ratings (on review sites like Yelp or branded e-commerce sites), deal sites (like Groupon), deal aggregators (aggregate deals into personalized deal feeds), social shopping markets (online malls featuring user-recommended products, reviews, and the ability to communicate with friends while shopping like Wanelo), social storefronts (online retail stores that sometimes operate within a social site like Facebook with social capabilities), community marketplaces (peer-to-peer sites like Etsy), and social networks with sales conversion functionality. In addition, organizations can socially enable aspects of their traditional e-commerce websites by using tools such as Facebook Connect (a Facebook tool that allows users to log in to other partnering sites using their Facebook identities) and share applications (tools that let users share what they are buying) (Tuten and Solomon, 2018).

In an ever-changing and fast moving social media landscape, the intent of this review is not to pursue the ultimate truth, which would be impossible to reach and too difficult to maintain. Merely, the purpose of the review of social media definitions and classification is to give an idea of the main features of this horizontal revolution and give a conceptual basis for understanding the present study about the impact of social media on the hospitality and travel industry. To do so, prior to understanding how the global society and the italians are coping with this big shift from the classical mass media models to the new media paradigms, some distinctions must be made.

Firstly, it is useful to briefly elucidate what **ICT** entail and how they relate to social media. ICT is used as a general term for diverse set of technologies which enable users to create, access, disseminate, store, manage, and communicate information in a digital format. ICT include computer hardware and software applications, encompassing: mobile phones, computers, network hardware, internet, telecommunication systems and so on, as well as the various related services and applications. In recent years there has been a groundswell of interest in how computers and internet can best be harnessed to improve social communication at different levels, which has propelled research and innovation in the area of ICT and social digital media (SDM), leading to the emergence of what has come to be known as participatory technologies such as Web 2.0. Overall, although ICT and social media are conceptually different, they are intertwined and inextricably connected. And they converge when mobilised as resources for or employed as means in social change, a process that entails altering social patterns of a society, which can involve economic development, political progress, cultural change, social revolution, etc[11].

Secondly, the difference between **Digital Media** and social media should be set. Though social and digital share similar attributes, they are not the same thing. "Digital is the

[11]<http://wpmu.mah.se/nmict11group1/2011/10/30/2-ict-and-social-media-definitional-issues-and-the-relationship> [Accessed: September 2018]

infrastructure, the plumbing and wiring, but social is the behavior and quite possibly the glue"[12]. Digital media is an all encompassing term covering anything that is online or digital including mobile, web, tv etc. Social is a subset of digital, just one of the available channels of digital. Digital media *per se* is any medium of communication which uses digital content. It can be either one way or two way communication. Whereas Social media is the communication channel where users interact and contribute in creating content.

Finally, one more distinction should be made for the understanding of the present study and it refers to marketing. It may be useful to clarify what the notion of **Social Media Marketing** encompasses and how it relates to traditional marketing and Digital Marketing.

1.2.2 Social media marketing

Just as Digital Media is the umbrella term used to encompass any medium of communication which uses online and digital content, including social media, so Digital marketing embraces all marketing efforts used to build awareness and increase engagement on digital platforms, including social media marketing.

The major components of **Digital Marketing** are: **Internet Marketing**, i.e. blogging, email marketing, web marketing, SEM (search engine marketing including SEO and Pay-per-click advertising), smartphones, mobile markets (i.e. Google Play, Apple Store), online banner advertising, etc. and Social Media Marketing; **Non-Internet digital channels**, i.e. Television, Radio, SMS, digital billboards (indoor and outdoor). Thus, as the diagram below shows, social media is just one of the available channels of digital marketing (Fig. 1.4).

[12] David Armano, “How Social Digital Is Your Company?”, Harvard Business Review October 19, 2011, <https://hbr.org/2011/10/how-social-digital-is-your-com> [Accessed: november 2017]

Fig. 1. 4 Digital Marketing vs Social media Marketing

According to Tuten and Solomon (2015) "Social media marketing is the utilization of social media technologies, channels, and software to create, communicate, deliver, and exchange offerings that have value for an organization’s stakeholders".

Similarly as the ICT revolution has changed the way society communicates, the advent and adoption of social media is changing the way brands and consumers interact. Traditional marketing focuses on push messaging, using a large dose of one-way broadcast and print media to reach a mass audience in a top-down communication. This means that messages are delivered to audiences whether they want to receive them or not, and regardless of whether these messages are directly relevant to their unique needs. There are minimal opportunities for interaction and feedback between consumers and the organization, and employees who interact directly with customers, mediate these dialogues.

With social media marketing, the ability for consumers to interact and engage with brands or organizations is greatly enhanced. Social media channels give consumers unparalleled access and interaction possibilities. Consumers discuss, contribute, collaborate, and share with companies and with each other. The culture of marketing has shifted to an informal one focused on the belief that customers are in control. Social media are not a substitute for traditional marketing communications, but they are also more than a complement to traditional methods (Tuten and Solomon, 2018).

Social media marketing is based on traditional marketing but adopts a fundamentally different philosophy in terms of the way interactions with potential and actual customers are structured. As illustrated by Yoo and Gretzel (2010), social media marketing functions span across all elements of marketing (Table 1.1). Therefore, social media marketing efforts should be seen as all-encompassing and as complementary extensions of other marketing efforts instead of a replacement (Evans, 2008).

Table 1. 1 Social Media Marketing Functions

Marketing Functions	Traditional Marketing	Social Media Marketing
Customer Relations	- One-way communication - Offline customer service center - Limited customer data - B2C communication - Prescribed solutions; scripted responses - Delayed response - One-off interaction	- Interaction - Online customer service - Customer identification with data mining - Virtual customer communities - Crowd sourcing - Real-time communication - Relationship
Product	- Limited product information - Mass products for mainstream markets - Company-created products	- Value added info. on products: Pictures, video, catalog, consumer reviews etc. - Product customization - Co-creation with consumers - Digital/virtual product
Price	- One-price pricing - Limited payment options	- Flexible pricing (Price transparency) - Online payment - Social buying
Promotion	- Offline promotions - One promotion message - Partnerships with traditional partners - Targeting customers - Mediated through mass media	- Online promotions - Customized promotion messages - Non-traditional partnerships - Customer participation - Viral spread facilitated by Web 2.0 tools
Place	- Intermediaries - Required time to process order/booking - Offline distribution of products	- Dis-/ Re-intermediation - Real-time ordering and processing - Online distribution of products
Research	- Delayed results - Push - Encouraged through incentives - No follow-up - Mediated - Sporadic - Costly - Response limited to numbers and text	- Real-time info through RSS or email alerts - Pull - Based on altruistic motivations - Immediate reaction - Unmediated - Continuous - Free data - Multiple formats
Performance Measurement	- Leads - Discrete times - Hard sales/visitor numbers	- Conversations - Continuous - Consumer sentiment

Birch (2011) describes social media marketing as being focused on 4 R's rather than the traditional 4 P's (Table 1.2). Gunelius (2011) calls for well-planned, active, and continuous engagement with influential consumers. This requires intricate knowledge of the social media types and their users, a long-haul commitment, and continuous engagement, through interesting content.

Table 1. 2 Marketing Paradigm Shift

CLASSIC MARKETING	SOCIAL MEDIA MARKETING
Product Price Place Promotion	Relationship Return on Engagement Reach based on Relevance Reputation

Tuten and Solomon (2018) contend that there are two overarching objectives relevant to the use of social media marketing as part of a brand's promotional mix:

1 Extend and leverage the brand's media coverage.

2 Influence the consumer throughout the decision-making process.

According to the two scholars, when it comes to acquiring space in media to distribute brand messages, marketers or organizations have access to three core types of media:

Paied media: those for which monetary fees are asked for the placement of promotional messages in channels capable of reaching a mass audience, including purchasing spaceto deliver messages and securing endorsement.

Owned media: channels the company controls. Corporate websites and e-commerce sites, corporate blogs, advergames, and alternate reality games (ARGs) all represent forms of owned media.

Earned media: those messages that are distributed at no direct cost to the company and by methods beyond the control of the company. Word-of-mouth (WOM) communication and publicity are important forms of earned media.

In Table 1.3 are shown the forms of paid, earned, and owned media that are possible in each of the zones of social media marketing.

Table 1. 3 Types of media (Tuten Solomon, 2018)

Zone	Paid Media	Earned Media	Owned Media
Social community	Ads	Conversations, Shared content, Influence impressions, Likes, fans	Controlled profiles
Social publishing	Endorsements, Branded channels	Embeds, comments, shares, links, search rankings	Corporate blogs, branded media sharing sites
Social entertainment	Social game ads	In-game interactions	Advergames, branded ARGs
Social commerce	Sales promotions	Reviews/ratings Referrals Group buys Social shopping	Social storefronts

More simply, Barefoot & Szabo, 2010 contend that social media marketing is using social media channels to promote a company and its products. The main difference is that the audience of the marketing messages not only consumes but also actively creates marketing contents (Evans, 2008). Engaging users' interest and participation is the critical point in social media marketing campaigns (Parsons et al., 1998). Evans (2008) sees it as one of three pillars: engagement, action and loyalty. It assumes an active audience of prosumers (Toffler, 1980) who want to interact with marketers or companies beyond the immediate sales transaction. It further acknowledges that loyalty in social media cannot be assumed, but must be actively assured (Kozinets, 1999). Social media marketing thus falls within the new marketing logic described by Vargo and Lusch (2004), which, instead of focusing on tangible resources, embedded value, and transactions, fully embraces intangible resources, co-creation of value, and relationships.

Social media marketing is essentially about building relationships (Barefoot & Szabo, 2010). In order to build those relationships, it needs to enable and shape conversations (Safko & Brake, 2009). Social media marketers and company managers are therefore conversation managers who develop methods to strategically influence conversations

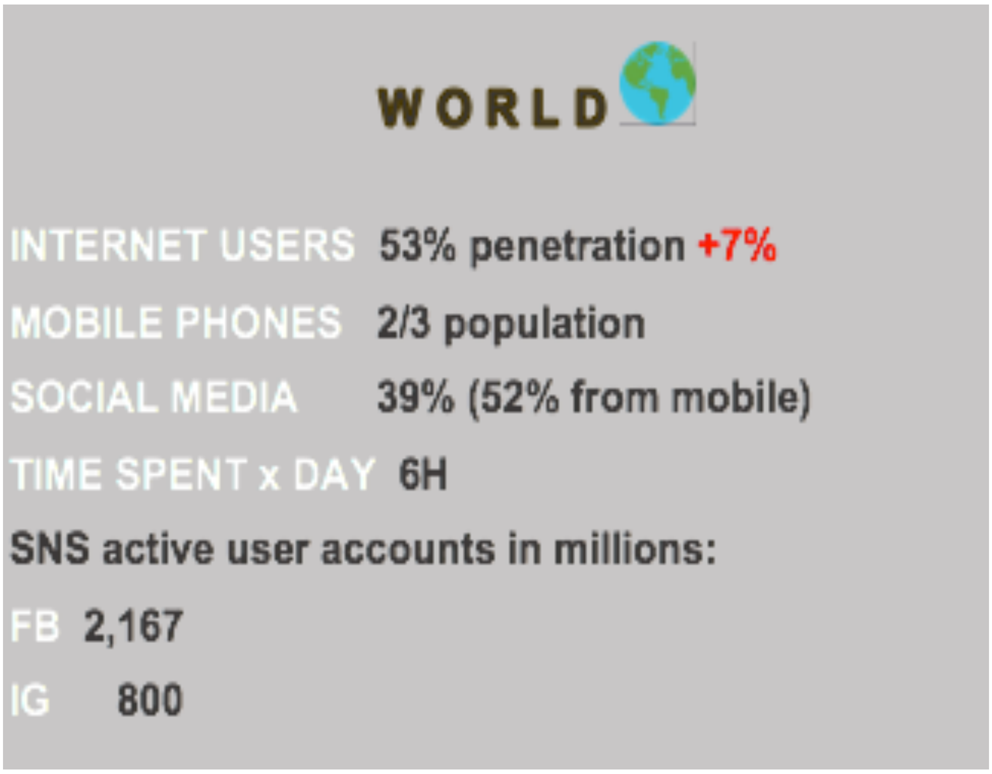
(Mangold & Faulds, 2009). Consequently, social media marketing is concerned with how conversations can be prompted, promoted and monetized (Safko & Brake, 2009). Consumers are active participants and equal partners in these conversations who co-create value together with organizations by exchanging resources and information (Vargo & Lusch, 2004). It is important to note that this means companies cannot control these conversations but can only try to influence them. User-generated contents can either reinforce marketing efforts or beat marketers at their own games (Evans, 2008). It also implies that companies need to obtain an intricate understanding of how meaning creation happens in a particular social media type and what use conventions have emerged so that they can manage conversations in a way that is appreciated rather than seen as intrusive by the consumers.

Practically, the main benefits of using social media marketing, according to the literature, include reducing administrative costs, increasing awareness (Jones, Borgman & Ulusoy 2015), enabling small businesses to compete with large businesses and to access global markets, enabling 24/7 operations to be provided, thereby overcoming the time limitations and being less expensive and complex to implement (Kim, Lee & Lee 2011).

1.3 Digital Society and Economy

The recent Digital in 2018 Global Overview[13] Report from We Are Social and Hootsuite (Fig. 1.5) revealed that more than half of the world's population now uses the internet and that more than half of the world's web traffic comes from mobile phones (52%). This means that one in two citizens of the world have the possibility to be connected at any time and everywhere. Global social media[14] users in 2018 were 4 billion, equaling a 53% penetration, 7% more than the last year. And this data are still growing.

Fig. 1. 5 Digital around the world in 2018



Elaboration from 2018 Digital Yearbook – We are social & Hootsuite - January 2018

Internet users penetration in Italy is much over the worlds' average, covering the 73% of the entire population (Fig. 1.6) and only one point below the European penetration (74%). Also, considering that every Italian adult (aged 15+) has at least one mobile phone, the time spent per day on the internet is 8 minutes above the world average.

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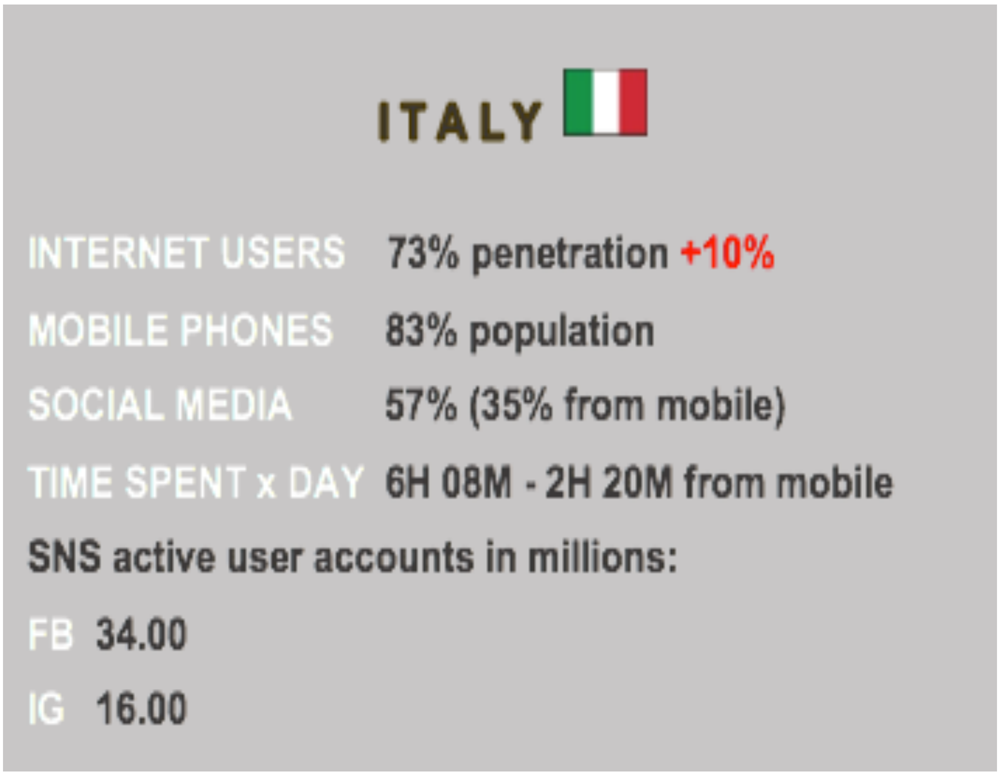
[13] <https://wearesocial.com/special-reports/digital-in-2018-global-overview> [accessed 8 March 2018]

[14] As Perez et al. (2013) argue social media "includes all media formats by which groups of users interact to produce, share, and augment information in a distributed, networked, and parallel process".

Fig. 1. 6 Digital in Italy in 2018



Elaboration from 2018 Digital Yearbook – We are social & Hootsuite - January 2018

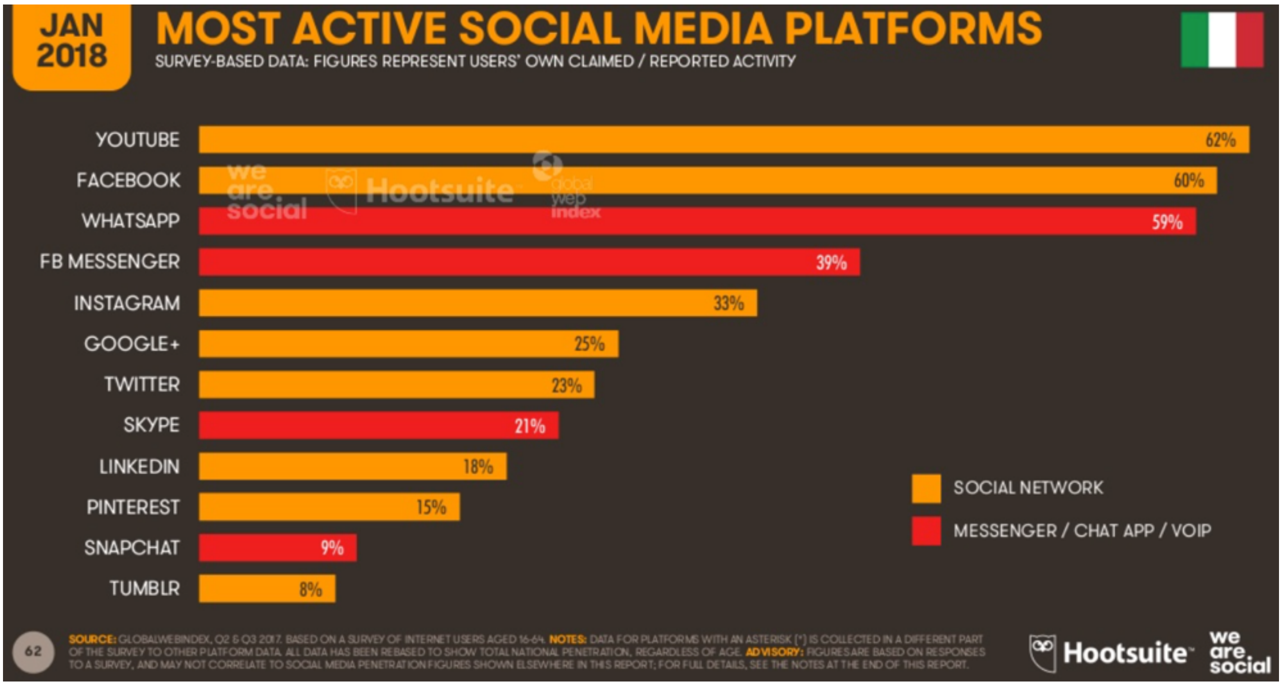
This means that Italians have become very social and connected over the last years and are still increasing this trend. Anyway, if more and more italians are online, the skills levels remain low and the Italian Internet users engage in online activities much less than the EU average does[15]. In other terms, Italians do use internet more than 8 hours a day, every day only engaging in few online activities. The most practiced social media activities among the Italian netizens are certainly those related to Social Media Networking.

According to the Digital Year Book 2018[16] the most used SNS in Italy is Youtube, immediately followed by Facebook (Fig. 1.7), which is, instead, by far the most used SNS globally (2.167 million monthly active users accounts against the 1,500 of Youtube).

[15] European Commission, Digital Economy and Society Index 2017 - Italy

[16] 2018 Digital Yearbook – We are social & Hootsuite - January 2018 Available at:< https://wearesocial.com/blog/2018/01/global-digital-report-2018> [Accessed February 2018]

Fig. 1. 7 Most active social media platforms in Italy 2018



The Italian economy for its part, has been lagging behind the very fast progress in ICTs and the digital transformation for many years in the past, being among the last countries to catch up in Europe. The main reason for this was the delay in technological infastructure (Wi-fi and Broadband diffusion) which has been finally recovered in the last years (Table 1.4; Fig. 1.8; Fig. 1.9)[17]. Today, Italy is among the first Countries in Europe for fixed broadband coverage and is performing around the average for the Next Generation Access coverage[18] that rose significantly from 41% of households in 2015 to 72% in 2016.

Table 1. 4 Broadband coverage in Italy compared to Europe

Coverage	IT-2015	IT-2016	EU-2016
Fixed broadband coverage (total)	99%	99%	98%
Fixed broadband coverage (rural)	94%	94%	93%
Fixed NGA coverage (total)	41%	72%	76%
Fixed NGA coverage (rural)	3%	16%	40%
4G coverage (average of operators)	no data	86%	84%

Source: Broadband Coverage Study (IHS and Point Topic). Data as of October 2015 and October 2016.

[17] European Commission Europe's Digital Progress Report 2017 country profiles - Telecom country reports (2017) available at: <https://ec.europa.eu/digital-single-market/en/news/europes-digital-progress-report-2017-country-profiles-telecom-country-reports> [Accessed: August 2018]

[18] Fiber to the x is the key method used to drive next-generation access (NGA), which describes a significant upgrade to the Broadband available by making a step change in speed and quality of the service.

Fig. 1. 8 Overall fixed broadband coverage in Europe 2016

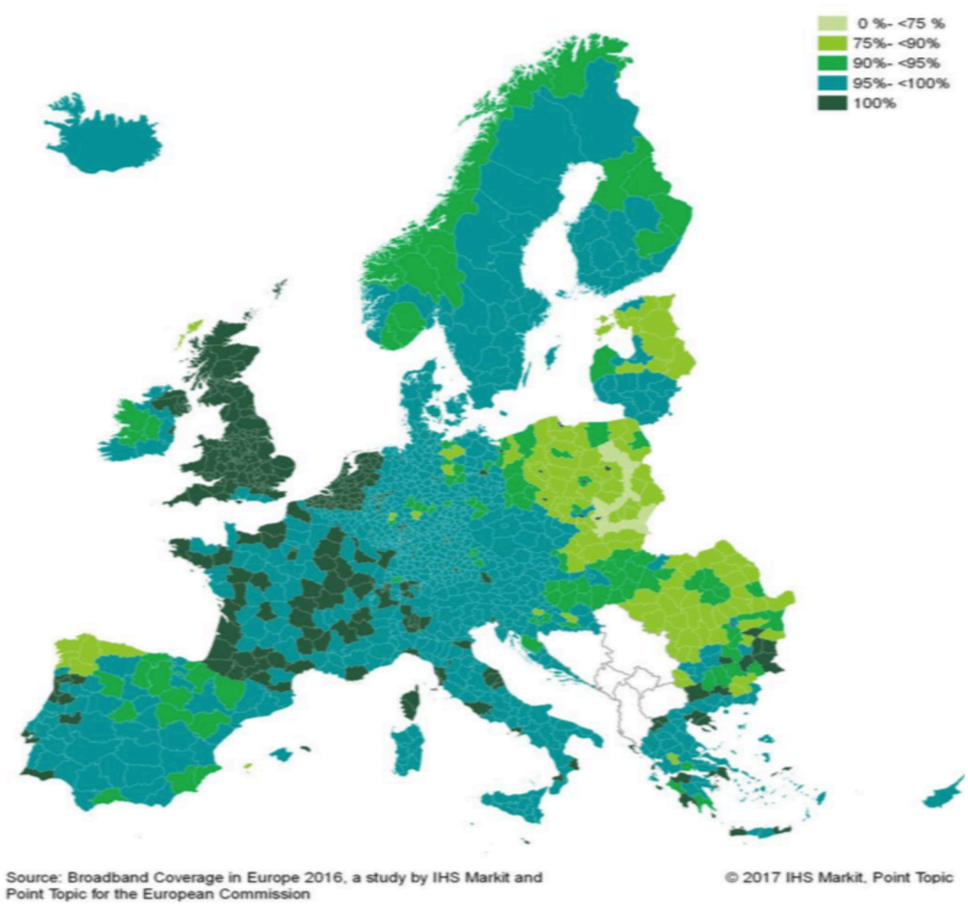
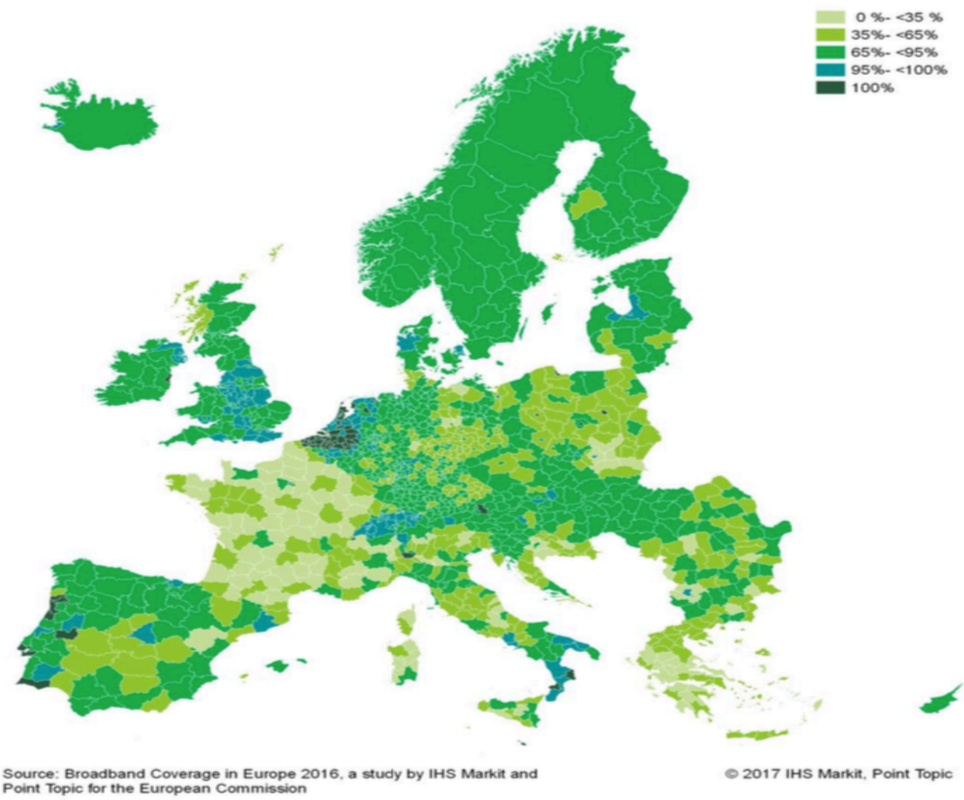


Fig. 1. 9 Overall NGA broadband coverage in Europe 2016



The Italian Governement has given a boost to the long awaited Italian economy digitalisation and connectivity with the National Plan "Industry 4.0"[19] launched in 2016. The Plan puts in place horizontal measures i.e. adopting a technology neutrality approach, addressed to all types of enterprises, regardless of their size or sector, with the purpose to boost the investment in new technologies, research and development, and revamp the competitiveness of Italian companies. The plan is complemented by an Ultra Broadband Plan, to improve connectivity and also includes funding to Italian Universities, tax breaks and venture-capital support.

Italy has made significant progress mainly thanks to the large increase in NGA coverage. In the past two years, according to the Europe's Digital Progress Report[20], published in 2017, Italy has had a 19.7% growth in corporate digitisation among the European countries. While, for the Digital Transformation Scoreboard 2018[21] "overall, Italy's profile is rather pronounced, featuring solid performances in the technological and entrepreneurial fields.

Italy performs strongly in the field of entrepreneurial culture, and also receives a solid score in the field of digital transformation and e-leadership. Meanwhile, digital skills and ICT start-ups remain a shortcoming for the italian firms (Fig. 1.10).

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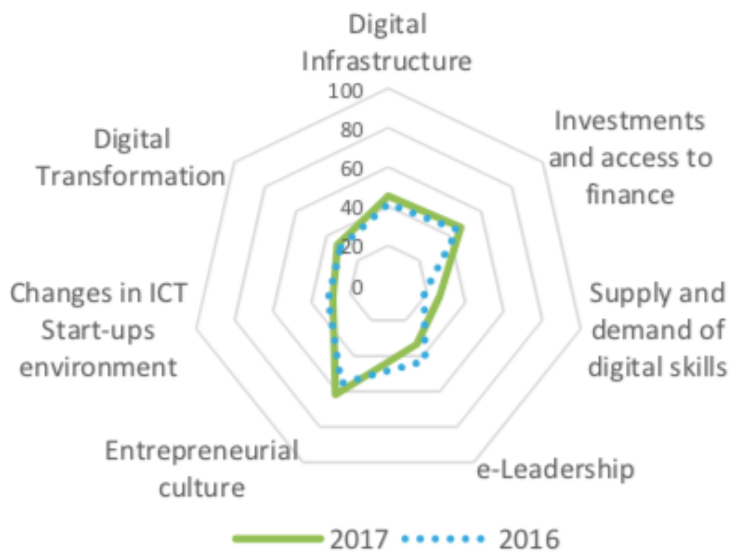
[19] The National Plan launched in 2016 by the Italian Ministry of Economic Development, known as "Industry 4.0." provides investments of 13 billion euro, which will be devoted to innovation and research. The goal is to reach 10 billion private investment for 2017: a major package of tax breaks will contribute to achieve this result. Public intervention will follow the private sector investment, amounting to 24 billion euro until 2020. These will be invested in 2017 in technology and goods and, by 2020, in research and development. The intentions of the government are oriented towards obtaining 200,000 students and 3,000 specialized managers within the industry 4.0. In addition to investments, the National Plan Industry 4.0 includes significant deductions and incentives in support of specialized training. Available at: http://www.mise.gov.it [Accessed: 3 September 2018]

[20] European Commission Europe's Digital Progress Report 2017 country profiles - Telecom country reports (2017) available at: <https://ec.europa.eu/digital-single-market/en/news/europes-digital-progress-report-2017-country-profiles-telecom-country-reports> [Accessed: August 2018]

[21] European Commission Digital Transformation Scoreboard 2018. Available at: <https://ec.europa.eu/growth/tools-databases/dem/monitor/sites/default/files/Digital%20Transformation%20Scoreboard%202018_0.pdf> [Accessed: August 2018]

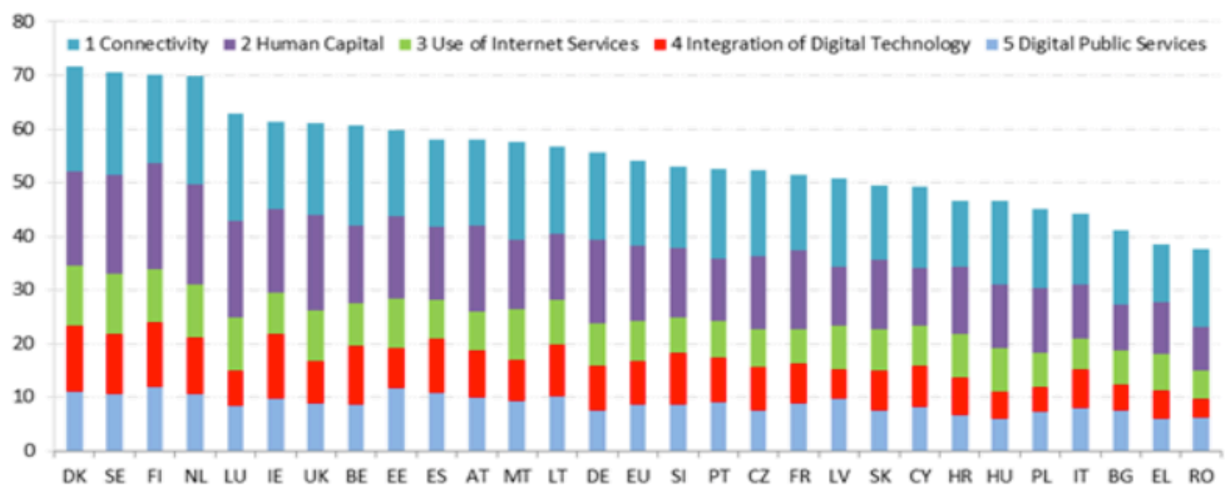
Fig. 1. 10 Italy's framework conditions for digital transformation



Source: European Commission

According to the Digital Economy and Society Index 2018[22], Italy ranks 25th (Fig. 1.11). The use of digital technologies by enterprises and the delivery of online public services is close to average. Compared to last year, Italy made progress on Connectivity, in particular through improvements in NGA access. However, its low performance in digital skills risks acting as a brake on the further development of its digital economy and society. Italy is, thus, closing the gap with the EU on business digitisation, however, rarely use electronic sales channels.

Fig. 1. 11 Digital economy and society index (DESI) 2018 ranking

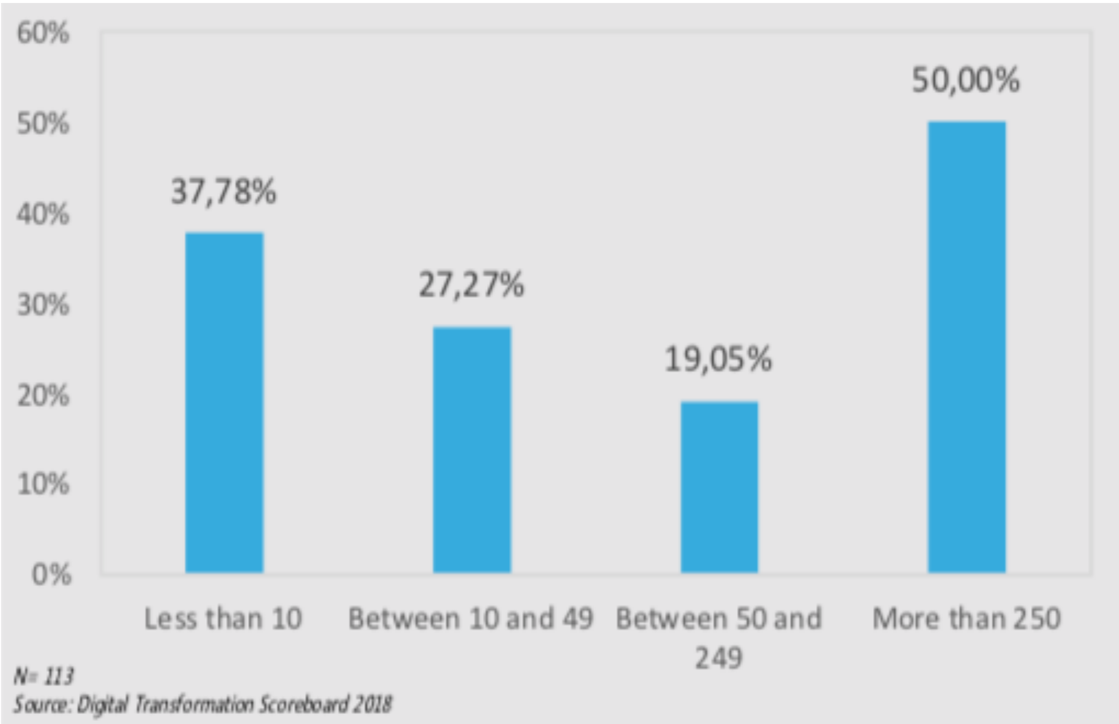


[22] European Commission Digital Economy and Society Index 2017 available at: < https://ec.europa.eu/digital-single-market/en/desi> [Accessed: August 2018]

Also, data from the Global Information Technology Report 2016 (Network readiness Index) of the World Economic Forum, show that Italy is one of the countries that improved the most during the last year its ability to leverage information and communication technologies to improve its competitiveness and the well-being of its population[23].

If the Italian economy digitalisation has made great progress in the last couple of years, there is, however, a different speed in the digital transformation process based on the size of the businesses. In general, large groups in Europe are more social than the SMEs, many being already at an advanced stage, often even ahead of their foreign competitors, while small and medium-sized enterprises lag far behind[24]. (Fig. 1.12).

Fig. 1. 12 Adoption of social media by European enterprises by company size



[23] *The World Economic Forum's Global Information* Technology *Report 2016* features the latest iteration of the Networked Readiness Index, which assesses the factors, policies and institutions that enable a country to fully leverage ICTs for increased competitiveness and well-being. Available at: http://reports.weforum.org/global-information-technology-report-2016/economies/#economy=ITA [Accessed: August 2018]

[24] Casini, S. (2018). "The digital transformation? Many have thrown away at least half a million." Industria Italiana. February 7, 2018

The speed of the digitisation process varies also among the different economic sectors. Apart for the different segments of the ICT sector (from telecoms to the manufacture of computers) that tend to be the most digitised sectors of the economy, others such as accommodation, travel agencies, cultural industries (publishing, film&television, music) and the wholesale trade are highly digitised in Europe. The pattern of sectoral variability in digitisation is similar across EU countries, with some positive exceptions of higher digitisation than expected, if looking only at the countries and sectoral marginal averages, among which the Accommodation in Italy, Portugal and Slovenia (Fig. 1.13)[25].

Fig. 1. 13 Percentage of EU enterprises with high (>6) Digital Intensity Index across economic sectors (2016)

Source: Eurostat Community survey ICT usage and e-commerce in enterprises

[25] European Commission Europe's Digital Progress Report 2017 Available at: <https://ec.europa.eu/digital-single-market/en/news/europes-digital-progress-report-2017> [Accessed: June 2018]

That said, the hospitality managers have no more infrastructural obstacles to delay their digital transformation. It is all upon their will and awareness.

1.4 The impact of social media on Tourism

The figures above give a clear idea of how this new communication platforms may have led to both vital changes and opportunities, but also threats, in business making. Using social media offers businesses an opportunity especially in terms of reaching their target audiences (Meredith, 2012) in a cheap and very fast way. Also, building much more interactive relationships (Papasolomou & Melanthiou, 2012) in order to disclose the consumers needs and desires and be able to offer more value to them. Indeed, social media are significant networks of consumer knowledge. But, with billions of users, social media are also high risk and threats. Social media are giving consumers a venue to voice their opinions, recommendations and complaints.

Research on word of mouth (WOM) effects provides plenty of evidence that a satisfied customer may tell some people about his experience with a company, but a dissatisfied one will tell everybody he meets (Chatterjee, Patrali, 2001). Therefore, online consumer-generated reviews (e-WOM[26]) and other content posted on the web can have a dramatic impact on brands' reputations. Monitoring this activity and managing the interactions with complaining consumers, as well as mapping and leveraging influencers in social media to shape corporate brand perceptions becomes vital to every business. The point is that to get the best of the opportunities given by the advances in ICT and to manage the threats, social media should be an indispensable part of organizations' strategies and practices (Peters et al., 2013).

[26] Electronic word-of-mouth communication (eWOM) is any positive or negative statement made by potential, actual or a former customer which is available to a multitude of people via the internet[1] While in traditional word-of-mouth, the message disappears as soon as it is spoken, in case of eWOM, the message remains over a period. eWOM includes blogs, online reviews, social media posts and messages posted on online groups. Source: <https://en.wikipedia.org/wiki/EWOM> [Accessed: June 2017]

In travel and tourism, the impacts of social media have been even more extraordinary, bringing unprecedented opportunities and challenges, primarily due to the experiential nature of tourism products: purchases are considered risky and therefore decision making processes are information intensive. Information technologies (IT) have been recognized as one of the greatest forces causing change in the Hotel industry (Law, Leung, Au, & Lee, 2013). Information technologies have dramatically changed the way we travel (Benckendorff, Sheldon, & Fesenmaier, 2015).

In particular, the emergence of Web 2.0 including social media and user-generated websites have enabled travelers to communicate, interact, and form relationships with destinations, travel-related businesses, and other travelers (Boyd & Ellison, 2007; Hudson & Thal, 2013). Mobile technology has also changed the nature and timing in which travelers use travel information (i.e. real-time information searching) (Gretzel & Fesenmaier, 2009; Gretzel, Fesenmaier & O'Leary, 2006; Tussyadiah, 2015; Xiang, Magnini, & Fesenmaier, 2015). Tourists receive and share information online and form virtual communities on a whole array of social media software. These encompass a variety of different types of ICT tools and take many different forms. Some of the most popular ones are wikis, blogs and microblogs, social networks, media sharing sites, review sites, and voting sites (Stillman & McGrath, 2008; Zarrella, 2010). Tourists share their travel images on Facebook, Instagram, Flickr, upload videos to Youtube, write personal stories on Travelblog, provide reviews on TripAdvisor, Foursquare among others and publish updates about their tourism experience on many different social networks. Hence, the participatory web has enabled new kinds of tourism interactions (such as electronic word-of-mouth), which complement and expand the experience of physical travel in diverse ways.

These technology-induced changes have led to a significant shift in the role of travelers from passive information recipients to active information creators (Wang, Xiang, & Fesenmaier, 2014b). Many scholars argued that social media combined with the popularity of mobile devices reshape the way travelers enjoy the trip and eventually, restructure the entire tourism experience (Gretzel, 2010; Gretzel & Fesenmaier, 2009; Kah & Lee, 2014; Wang et al., 2012; Wang, Xiang, & Fesenmaier, 2014a; Xiang et al., 2015).

Social media represent important tools supporting the travel planning process and subsequent behaviors throughout the entire trip by fulfilling a number of specific needs of travelers at a particular moment across all stages of the trip. According to Gretzel there are three main stages of a travel: pre-trip, during-the-trip, and post-trip (Gretzel & Fesenmaier, 2009; Gretzel et al., 2006; Vogt & Fesenmaier, 1998; Wang, Park, & Fesenmaier, 2012). Minazzi (2014) declined the three stages in further sub-stages: need recognition, information search, evaluation of alternatives and booking/purchase as a part of the pre-trip phase (anticipatory), the consumption as part of the during-trip stage (experential) and post consumption as part of post-trip (reflective). Whereas the Google Travel Study, commissioned to Ipsos MediaCT in 2014 recognised that the stages of travel are five: Dreaming; Researching; Booking; Experiencing and Sharing (Fig. 1.14)[27].

Travelers usually exhibit a variety of different behaviors (i.e. sharing, creating, searching, etc.) throughout all stages of the tourism experience, which in turn results in highly idiosyncratic trip-related decisions and experiences (Gretzel et al., 2006; Wang et al., 2012, 2014b).

Fig. 1. 14 The five stages of travel

Source: Google

[27] Ipsos MediaCT, (2014) Google Travel Study, The 2014 Traveler's Road to Decision Available at: <http://storage.googleapis.com/think/docs/2014-travelers-road-to-decision_research_studies.pdf> [Accessed June 2016]

Social media have a great influence on the tourists' decisions or behaviours throughout all the stages of travel and tourism experience. User generated content and eWOM on social networks can influence the transformation process of a need in a specific desire. Research confirms how UGC is considered particularly important during the travel planning (Gretzel 2007; Xiang et al. 2014) as a source of information. For example, online comments, photos and videos of other travellers can help selecting information, making decisions and even changing mind and plans. According to Fotis (2012) a large majority of travellers investigated made some sort of changes to the original travel plan after having consulted online UGC.

Travelers now have the privilege of instantaneous access to information across the web in the form of Buzzfeed guides, TripAdvisor reviews[28], and travelers' Instagram photos depicting their latest vacation. This real-time access to relevant tips and, often, crowd-sourced information, has ultimately changed the way travelers approach planning a trip, from inspiration (dreaming) to booking and experiencing.

This means that properly using social media is a matter of survival for tourism companies operating in the digital era. The technological environment continuously offers new web-based solutions and tools to companies for the purpose of advancing marketing activities. Such solutions and tools are also increasingly available for SMEs because their uptake requires minimal financial investment, if any. However, this then results in new requirements concerning organisational capabilities and skills. Consequently, the former dilemma of whether 'to use or not to use ICT' in tourism SMEs is now becoming more about how to develop organisational marketing capabilities through the use of social media to ensure the competitiveness of a company (Meriläinen, 2017).

Are Italian tourism companies and practicioners ready for this?

[28] Tripadvisor the world's largest travel site, reached 661 millions reviews and opinions in 2018 (290 pieces of content are posted every minute of every day) covering the world's largest selection of travel listings worldwide with approximately 7.7 million accommodations, airlines, experiences, and restaurants. Source: <https://tripadvisor.mediaroom.com/us-about-us> [Accessed: September 2018]

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Chapter 2

SOCIAL MEDIA
in the
HOSPITALITY INDUSTRY
a
LITERATURE REVIEW

2. Abstract

Social media applications in the field of hospitality and tourism have become popular research topics in academia in recent years given to their growing popularity and influence among tourists in all the phases of their travel experience. However, most of the existing studies focus on the consumer behaviour and less research is dedicated to the challenges that the tourist interaction on social media represents for hospitality firms. This work is to be set in the stream of the supply-oriented perspective analysis (Munar et al., 2013).

To outline the evolution of the business and management literature dedicated to the impact of social media on the accomodation firms and on their usage and perception of it, a systematic review, along the work published from 2008 until today, was conducted. A quantitative content analysis approach was used extensively in the analysis of textual data thanks to the online availability of the publications.

Despite the vast plethora of publications on social media in tourism and hospitality only 93 studies met the selection criteria and were eligible to be included in the review.

The findings reveal that the impact of social media on hospitality businesses is overall very positive. However research on the usage of ICT by accomodation managers and on their perception of it, assesses a low perception of the potentialities of social media and an underuse of it for marketing purposes. This is true for many countries of the world except for the Asian ones.

Since most research focus on Hotels, further investigation on other accomodation types is highly recommended.

Keywords

Tourism, hospitality, accomodation, ICT, social media

2. List of Figures

2. List of Tables

2.1 Introduction

With an ever-increasing number of studies being published in the social media and tourism fields, it has become challenging for researchers to keep up with the literature.

Undertaking a review of the literature is an important part of any research project. Mapping and assessing the relevant intellectual territory are the first steps in order to specify a research question which will further develop the knowledge base (Tranfield, 2003).

The most difficult task is to find the right path to follow in the vast plethora of studies in order to get a coherent and most comprehensive as possible interpretation of what knowledge and ideas have been established on a topic. Indeed, since social media embraces so many different features and perspectives and aspect which often cross with the others, it may be easy to get lost in the maze without success in finding a guiding principle.

When I first set about analysing the existing literature review on the impact of social media on the hospitality industry I was overwhelmed by a huge quantity of publications, most of which had nothing to do with the specific topic of this study. A very big part of the articles and proceedings focused, indeed, on the consumer behaviour and fewer were supplier-oriented.

The use of a systematic approach to the review certainly helped in finding a way amidst the whole host of publications.

2.2 Methodology

This work sets out to provide a systematic review and commentary along the literature about the impact of social media on the hospitality firms. A quantitative content analysis approach was used extensively in the analysis of textual data because of the many online review articles in social media literature.

Systematic reviews[29] differ from traditional narrative reviews in several ways. Narrative reviews tend to be mainly descriptive, do not involve a systematic search of the literature, and thereby often focus on a subset of studies in an area chosen based on availability or author selection. Thus narrative reviews while informative, can often include an element of selection bias. Systematic reviews, typically involve the adoption of a scientific and transparent process, in other words a detailed and comprehensive plan and search strategy derived a priori, with the goal of reducing bias by identifying, appraising, and synthesizing all relevant studies on a particular topic (Uman, 2011).

The general process of literature review adopted in the present study went through different phases (Fig. 2.1) which at the end brought to outline the evolution of the business and management literature dedicated to the impact of social media on the hospitality industry. In particular it led to establish to what extent existing research has progressed towards clarifying our topic and Identify relations, contradictions, gaps, and inconsistencies in the literature that finally allowed to describe directions for future research.

The systematic review process started, with the SCOPING. In fact, some scoping of the literature was needed to find out what was done before and what might make a novel and interesting scientific contribution to the literature. After some search, the review questions were formulated according to my field of interest. The first scoping also clarified whether the planned systematic review had already been done by other researchers.

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[29] A review of a clearly formulated question that uses systematic and explicit methods to identify, select, and critically appraise relevant research, and to collect and analyse data from the studies that are included in the review.<https://pdfs.semanticscholar.org/2214/2c9cb17b4baab118767e497c93806d741461.pdf [Accessed: May 2017]

Fig. 2. 1 Systematic Literature review process

The review process continued then, with the PLANNING phase, At this stage of the process the research questions were broken down into individual concepts to create search terms which then helped finding as many potentially relevant articles as possible to include. The aim of this work is, indeed, to be exhaustive and therefore representative of all studies that have been conducted on the topic of interest, still being fully aware that it is very difficult to be up to date when it comes to social media. In the balance between sensitivity (finding as many articles as possible that may be relevant) and specificity (making sure those articles are indeed relevant), at this stage I wanted search terms to be more on the side of sensitivity so that I could trust I was not missing anything. In any case the definition of inclusion and exclusion criteria formulated on the base of my knowledge of the literature, helped in clearly defining the boundaries of the review.

Having reached the SEARCHING stage, the aim was to find all available published or unpublished work which could address the research questions set through the chosen search terms. As, Tranfield et al. (2003) among others contended, searches in a systematic review, should not only be conducted in published journals and listed in bibliographic databases, but also comprise unpublished studies, conference proceedings, industry trials, the Internet and even personal requests to known investigators (Tranfield et al., 2003). So I did, as I will explain later on, in the attempt to produce a review which is as exhaustive as possible.

The SCREENING stage was a quite delicate one. Reading the title and/or abstract of all work identified by the search stage took more than a while but resulted in choosing all studies which were potentially eligible for inclusion. For all the work meeting the inclusion criteria the full-text version was obtained. This first locating and sifting process continued to err on the side of sensitivity.

Finally in the ELIGIBILITY stage I sifted the full-text version of all potentially eligible articles and extracted relevant information to be included. At this point my focus shifted from sensitivity to specificity, making sure that potentially eligible studies were indeed relevant and appropriate for inclusion.

Once all the relevant publications were included for the review a preliminary coding sheet was prepared to evaluate each article along the following dimensions: year of publication, published journals, authorship trends, industry sectoral focus, type of publication, research methodology and study design and social media topics. Most of the evaluation criteria were developed based on previous meta-analysis in the field of hospitality and tourism management (e.g. Li, 2014). With regard to research methodology and design, two major types of research methodologies (i.e. non-experimental and experimental) were used to categorize articles (Salkind, 2005).

2.2.1 Research questions

As an output of the first stage of the systematic literature review process (scoping), the research questions were formulated. As said above, in this phase some preliminary scoping of the literature was needed, first of all to understand the state-of-the-art of knowledge and discussion among scholars and pratictioners about the impact of social media on the hospitality industry. Secondly to find a guiding principle to the topic I was interested in. This stage was to me one of the toughest of the whole review process. Indeed, before getting to know the systematic review process it took me a lot of time and reading to find a common threat among an immense plethora of studies on social media. Anyway, at the end there was light.

The research questions that may have helped to dig a way out of the mess, according to the knowledge I got at this stage were:

- Do Hospitality companies use social media?
- Which is their perception of social media?
- Which is the impact of social media on the hospitality companies?

The three research questions, first of all, set the boundaries of the work. Indeed the aim is to focus on the supplier-oriented literature and thus to exclude a whole lot of publications, probably the biggest part of the whole literature, on social media and tourism, which is about the use of social media by tourists and the impact of ICT on the consumers' behaviour. This is, in fact, confirmed by Leung et al. (2013) in their review, where it arises that "the majority of the studies were from the perspective of consumers (65.8%) instead of suppliers (32.4%)", as well as by Lu et al. (2017) which state that "the majority of the articles (80%) from 2004 to 2014 were from the perspective of the consumers, focused on the role of social media in the pre- or post-stage of travel or purchase".

The aim of the first question is to understand whether accomodation companies do use social media and to which extent. The previous literature will be investigated to find studies on the online presence, rather than the use of web sites or the management of social networking sites accounts, and so on. This question will also try to find existing work on the interaction between hospitality suppliers and consumers, through online reviews management, for instance.

The second question, which is complementary to the first one, is all about the knowledge about social media and the perception or awareness[30] of the importance of ICT as a key to success for the hospitality firms. What matters for the purpose of this study is to understand whether the accomodation managers are in line with the paradigms shift[31] in

[30] According to the Oxford dictionary, Awareness *is the concern about and well-informed interest in a particular situation or development*. This means there must be concern and will to understand a matter, to tell there is awareness of it.

[31] "A paradigm shift, a concept identified by the American physicist and philosopher Thomas Kuhn, is a fundamental change in the basic concepts and experimental practices of a scientific discipline. Kuhn contrasts paradigm shifts, which characterize a scientific revolution, to the activity of normal science, which he describes as scientific work done within a prevailing framework (or paradigm). In this context, the word "paradigm" is

communication and the challenges it brings with it. In other words, if the hospitality managers have the tools (knowledge, awareness, perception of) to cope with it.

Finally, the third research question, intends to analyse the extant literature to assess the return in terms of positive or negative effects of using social media for the hospitality firms.

At this stage of the literature review process, after some scoping of the existing publications on social media and tourism, I had the possibility to establish that no systematic reviews focusing the same topics already existed as at 2017. The last meta-review on "Mapping the progress of social media research in hospitality and tourism management" was dated 2014 (Lu, Chen, Law, 2017) and the literature has rapidly expanded since then, therefore new studies need to be accounted for.

2.2.2 Selection Criteria

In the planning stage (Fig. 2.1), as anticipated above, the research questions were broken down into individual concepts to create search terms to be used to select articles. At this stage all the Selection or Eligibility criteria were defined. The Selection criteria encompass both inclusion and exclusion criteria. The first ones are those elements of an article that must be present in order for it to be eligible for inclusion in a literature review. The latters are the elements of an article that disqualify the study from inclusion in a literature review. Being the research domain, in my case very broad, the inclusion and exclusion criteria needed to be detailed (Lipsey and Wilson, 2001).

With regard to the **Inclusion Criteria** (Table 2.1) the time frame was first set. Trying to produce a most up-to-date literature review possible and in order to cover a decade of studies, the chosen time frame was from 2008 to present. Being aware of the fact that the number of articles on social media use in hospitality and tourism increased significantly from a one-digit to a two-digit number and continued to grow dramatically over the course of five years, from 2010 to 2014 (Lu et al. 2017), it would have been useless to expand the time

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used in its original Greek meaning, as "example"". Source <https://en.wikipedia.org/wiki/Paradigm_shift> [Accessed: October 2017] frame. As for the search strings, from a first scoping of the existing literature it emerged that the terms Hospitality and accomodation are often used synonymously. Therefore both terms were included as selection criteria. The same occurs with social media and ICT. Although the two terms do not have the same meaning, since ICT is the wider category of Information and Communication Technologies which also include social media, ICT as a term, is often used as an alternative to social media. Boolean logic search operators AND (a search for all of my search terms) and OR (a search for at least one of my search terms) were used to connect and define the relationship between the search terms Hospitality or Accomodation and ICT or social media. This allowed to narrow the search.

As Subject areas, all the ones that may have to do with the business management and the behaviour of managers were included. To decide the subject areas I first sifted all the possible given results for each area proposed by the databases and concluded that only the ones listed in Table 2.1 could rerturn publications to be relevant to my research.

Table 2. 1 Inclusion criteria

Primary key words	Boolean	Secondary key words	Time frame	Doc type	Subject area	Databases
Hospitality		Social Media			Business, Management and Accounting;	Scopus
OR	AND	OR	2008 - 2018	article, conference proceeding, review	Social Sciences;	Web of Science
Accommodation		ICT			Economics, Econometrics and Finance	IFITT

The choice of the databases, came, as for the other inclusion criteria, after some scoping of the existing literature and after a lot of search on different databases or search engines. The best option to avoid duplication and to find as many articles as possible that may be relevant turned out to be searching Scopus and Web of Science as the main bibliogaphic databases. In addition, since a systematic review should not only be conducted in published journals and listed in bibliographic databases, but also comprise unpublished studies, conference proceedings, etc. (Tranfield et al., 2003), I searched the proceedings database of IFITT. The International Federation for Information Technologies and Travel & Tourism (IFITT) is the leading independent global community for the discussion, exchange and development of knowledge about the use and impact of new information and communication technologies (ICT) in the travel and tourism industry[32]. At present the ENTER conference, yearly organised by IFITT, and the IFITT community provide such an important and worldwide eTourism knowledge hub that a literature review would not be exhaustive without taking their publications into consideration. To be allowed to access and download the ENTER conference proceedings or articles published by SpringerLink[33] a membership to the IFITT, including the payment of an annual fee, is needed.

As **Exclusion criteria** I considered, first of all the date. Studies published before the year 2008 have been excluded. Another exclusion criteria concerns the language. For a very practical reason, all work published in other languages than those I know (english, french, german, spanish, dutch and italian) were excluded. Although very few languages other than english are used in academia, I found a few articles written in chinese and russian, and translating them would take too much time to be worth it.

Finally the major exclusion criteria relates to the field of interest. All articles focused on the customer behaviour or more generally on the consumers perspective were excluded. Also, all work focusing on destination management and all the studies enquiring on a specific social media tool have not been included in the review. In other terms, all studies which were not directly concerned with the use of social media by the hospitality entrepreneurs and their perception of it or to the impact of social media, were left aside. To narrow the research I also decided not to use Tourism as a search term since it is a too wide and all-encompassing term and the focus of this work are only the hospitality companies. I granted, though, careful consideration to all those particular studies I encountered when sifting the literature, and that were ‘near misses’ or ‘borderline cases’, studies which could be almost equally argued for inclusion or exclusion.

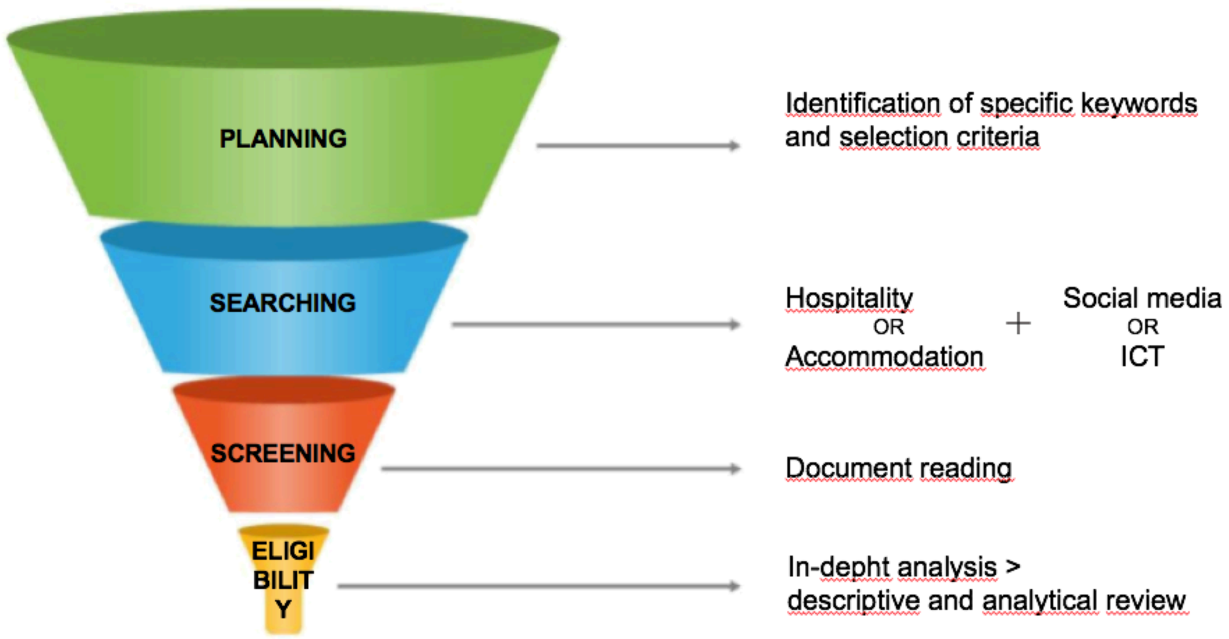
[32] Source: < https://www.ifitt.org/meet-ifitt/> [Accessed on April 2017]

[33] Source: < https://link.springer.com>

2.3 Literature review

Having gone through all the stages illustrated in the methodology (Fig. 2.2) I got all the potentially eligible work and extracted all relevant information to be included in the review. In particular, after the SEARCHING process, I located all available studies which could address the research questions and began sifting literature to find all articles potentially eligible for inclusion. Articles on the impact of social media on hospitality companies were identified and gathered from three of the largest and most popular online databases (Scopus, Web of Science and IFITT). I found a total of 963 publications of which I read the abstracts and/or titles to decide which to exclude and which to keep since useful and relevant to the research questions. After the SCREENING process a total of 103 articles remained (Fig.2.4). Of all the publications which were considered eligible for inclusion I read the full text (ELIGIBILITY process), excluded 10 articles because focusing preminently on the consumer behaviour and extracted the relevant information from 93 publications.

Fig. 2. 2 Literature review process



2.3.2 Descriptive Literature review

I located a total of 182 publications in the Scopus Database, a much higher number in Web of Science (452 articles, proceedings, etc.) and 329 in the IFITT database (*Table 2. 2*) for a total of 963 articles. The IFITT database which is accessible only for members having payed the annual fee, contains tourism and technology publications including ENTER eTourism Conference proceedings. Unfortunately the database platform (SpringerLink) has many limits that make the sifting procedure much more time-consuming. For instance, it is not possible to refine the search choosing more than one discipline or content type, nor language etc., therefore I had to check the work published in every single discipline, one by one and to check each single proceedings book per each year from 2008 to present. Also, the site does not offer many other usefool tools such as rankings, total by year etc., so I had to do additional calculations.

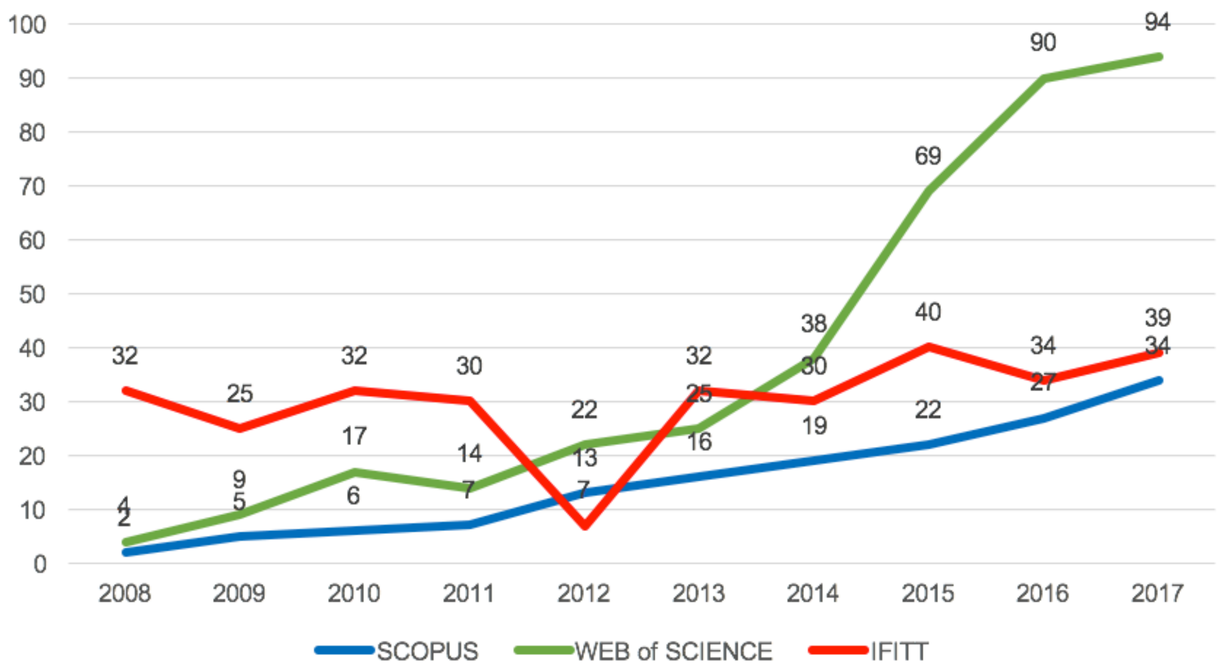
Table 2. 2 Searching stage results

Year	SCOPUS	WEB of SCIENCE	IFITT	TOT	percentage	growth compared with previous year
2008	2	4	32	38	4%	-
2009	5	9	25	39	4%	3%
2010	6	17	32	55	6%	41%
2011	7	14	30	51	5%	-7%
2012	13	22	7	42	4%	-18%
2013	16	25	32	73	8%	74%
2014	19	38	30	87	9%	19%
2015	22	69	40	131	14%	51%
2016	27	90	34	151	16%	15%
2017	34	94	39	167	17%	11%
2018[34]	31	70	28	129	13%	-
Total	182	452	329	963	100%	

[34] Since the year 2018 is not over yet - the review considers the period January-September - it may not be compared to the previous one as for the growth in the number of publications.

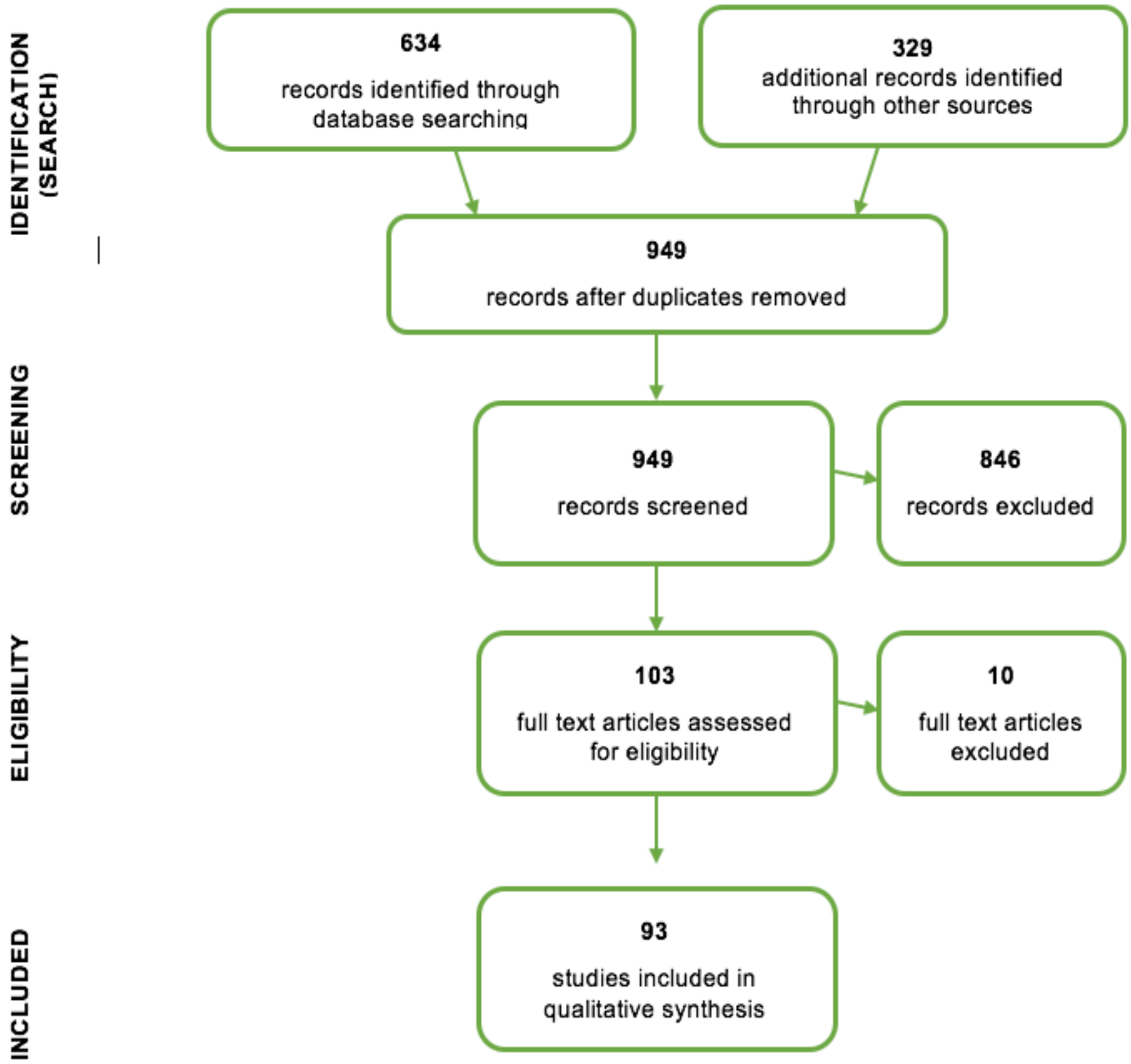
The growth in the number of articles published per each database, compared with the previous year has gone up and down in the years from 2008 until 2014, at least for Scopus and IFITT. Web of science registered, instead, a peak in 2015 with nearly a twofold increase in the number of publications (Fig. 2.3). As a general trend the number of publications has substantially increased from year 2015.

Fig. 2. 3 Growth compared with previous year per database



After the Screening process, that is to say, after the reading of all abstracts and/or titles and after the exclusion of the duplicates a total of 103 articles remained. For all the 103 remaining articles a copy of the full text version was acquired from various sources (Fig. 2.4). From all the full text articles assessed for eligibility a part was excluded (10 articles) since were found to be not matching the research questions. In particular the excluded articles were focusing on the consumers behaviour and expectations. Finally, the 93 studies left, have been included in the qualitative synthesis focusing on the impact of social media on the hospitality companies and in particular on their use of ICT and perception of it (Fig. 2.4). The main reasons for article exclusion in the screening phase was due to the fact that focus was set on the consumers' behaviour or on tourist destination and destination management organisations (DMO) or else, on travel companies. A minor part of publications focused instead on restaurants or events.

Fig. 2. 4 PRISMA Flow diagram 2009[35]



One paper has been included in the eligibility list although it is not directly related to hospitality companies and was not located by the database search, but was in the reference list of another article and turned out to be useful to my review since it analyzes the impact of social media on small businesses (Jones, Borgman and Ulusoy, 2015). Some other papers were found from the references of the articles included in the eligibility list.

[35] PRISMA is an evidence-based minimum set of items for reporting in systematic reviews. Source < http://www.prisma-statement.org > [Accessed: September 2018]

The duplicates exclusion has been made starting from Scopus which was the first database I used for locating articles, therefore the distribution per year in the Web of Science database may be distorted.

Besides the initial high number of articles located in the research stage, much fewer publications (9.6%) concern the usage and perception of social media by accomodation managers and even lesser deal with the impact of social media on the hospitality companies.

2.3.2.1 Year of publication

Social media applications in the field of hospitality and tourism have become popular research topics in academia in recent years given their growing popularity and influence. A significant meta-review of social media literature (Leung, Law, Van Hoof, & Buhalis, 2013) revealed a growing number of articles on social-media-related topics from 2007 to 2011. A more recent one (Lu, Chen and Law, 2017) mapped the progress of social media research in hospitality and tourism management from 2004 to 2014 and showed that year 2010 was a turning point of the accademic research with an incredible rise in the number of articles published on social media.

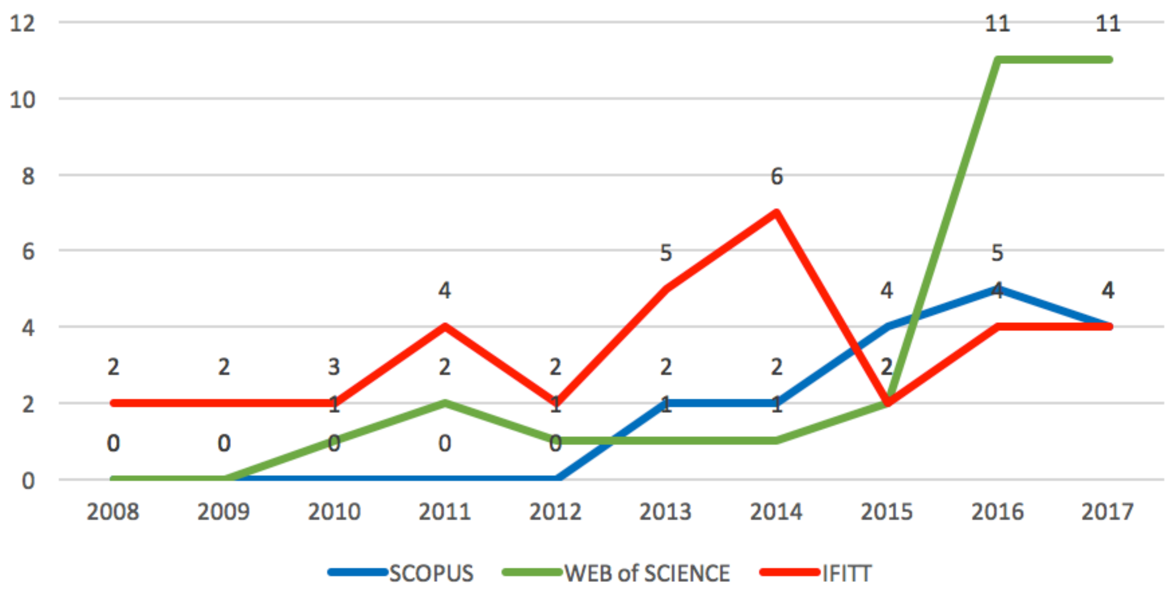
This trend was not confirmed by the present review on the specific topic of the impact of social media on hospitality businesses and their usage and the managers' perception of it. In fact, 2010 was a year of scarce production (1 article and 3 proceedings) while the year 2016 may be considered a turning point in this case.

As the Graph in Fig. 2.5 above shows, the production of articles matching the research questions, i.e. the use of social media by hospitality companies, their perception about ICT and the impact of social media on hospitality companies, have gone up and down from 2008 to present with a different trend among the three sources. The difference may have been affected by the duplicates exclusion. However, it is difficult to discern a unique trend. The production has been very scarce until the year 2012, but the number of publications started to considerably increase from year 2016 (considering that results for the year 2018 are only partial).

Table 2. 3 Screening stage results per database

Year	SCOPUS	WEB of SCIENCE	IFITT	TOT	percentage %	growth compared with previous year
2008	0	0	2	2	2%	-
2009	0	0	2	2	2%	0%
2010	0	1	3	4	4%	50%
2011	0	2	4	6	6%	100%
2012	0	1	2	3	3%	-50%
2013	2	1	5	8	9%	167%
2014	2	1	6	9	10%	20%
2015	4	2	2	8	9%	-20%
2016	5	11	4	20	22%	150%
2017	4	11	4	20	20%	-5%
2018	4	5	3	12	13%	-
Total	21	35	37	93	100%	

Fig. 2. 5 Year of publication per database



2.3.2.2 Journals

Publications eligible to be included in the review where located in a total of 35 Journals and some proceedings books including the ENTER proceedings publication *Information and Communication Technologies in Tourism* from which I got great part of the articles (Table 2.4). All other articles that have been published as conference proceedings have been classified in the table 2.4 under the category *Other conference proceedings.*

Table 2. 4 Number of publications per Journal

No	JOURNAL	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	TOT	%
1	Information and communication technologies in tourism enter proceedings	2	2	2	4	2	5	7	2	4	4	3	37	40%
2	International journal of contemporary hospitality management				1			2	1	3	1	1	9	10%
3	Other conference proceedings					1				2	4	1	8	9%
4	Journal of travel and tourism marketing						1		1			1	3	3%
5	Cornell hospitality quarterly									1	1		2	2%
6	Corporate ownership and control									2			2	2%
7	International journal of hospitality and tourism administration									1	1		2	2%
8	International journal of hospitality management								1		1		2	2%
9	Journal of hospitality and tourism technology										2		2	2%
10	Academia-revista latinoamericana de administracion								1				1	1%
11	Agrarian perspectives			1									1	1%
12	Amfiteatru economic							1					1	1%
13	Bridging tourism theory and practice										1		1	1%
14	Development southern africa									1			1	1%
15	Economic research-ekonomska istrazivanja									1			1	1%
16	International journal of applied business and economic research										1		1	1%
17	International journal of ecosystems and ecology science-ijees									1			1	1%
18	International journal of marketing communication and new media										1		1	1%
19	Jounal of business research											1	1	1%
20	Journal of hospitality and tourism management											1	1	1%
21	Journal of information science											1	1	1%
22	Journal of marketing management						1						1	1%
23	Journal of quality assurance in hospitality & tourism								1				1	1%
24	Journal of service theory and practice											1	1	1%
25	Journal of small business and enterprise development								1				1	1%
26	Journal of travel research										1		1	1%
27	Service business				1								1	1%
28	Tourism											1	1	1%
29	Tourism and hospitality management-croatia									1			1	1%
30	Tourism culture and communication									1			1	1%
31	Tourism economics						1						1	1%
32	Tourism management perspectives									1			1	1%
33	Tourism planning and development											1	1	1%
34	Turismo-estudos e praticas									1			1	1%
35	Worldwide hospitality and tourism themes										1		1	1%
	TOT	**2**	**2**	**3**	**6**	**3**	**8**	**10**	**8**	**20**	**19**	**12**	**93**	**100 %**

Among the journals, 67% are in the domain of hospitality and tourism, and the remaining are in the fields of marketing, business and management, social sciences and information technology. The number of articles published in each journal varied from one to nine excluding the proceedings. The International Journal of Contemporary Hospitality Management published the largest number of social media articles (9), covering 6 years of the whole time-frame, followed by far from the Journal of Travel and Tourism Marketing (3). More than half of the articles were published in leading hospitality and tourism journals, indicating that social media research was mostly of high quality.

2.3.2.3 Authorship trend

Among the hundreds of authors (including co-authors) publishing on the impact of social media or ICT on hospitality/accomodation businesses, nineteen authors published more than one article on social media in hospitality and tourism from 2008 to 2018 (Tab 2.5).

Table 2. 5 Authorship trends[36]

No.	AUTHOR	TOT	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
1	LAW R	10	1			1	1	1	1	3	1	1	
2	LEUNG R	7		1			1	1	1	3			
3	BUHALIS D	6	1			1	1	2				1	
4	FUCHS M	3					1				1	1	
5	INVERSINI	3	1				1	1					
6	PESONEN J	3					1			1	1		
7	QI S	3		1	1							1	
8	SAURA IG	3			2	1							
9	SCHEGG R	3		1				2					
10	CANTONI L	2				1				1			
11	LEE H	2					1			1			
12	HASHIM N.H	2		1									1
13	LIM W.M.	2								1	1		
14	PRANICEVIC DG	2			2								
15	RABIE C	2			2								
16	SCAGLIONE M	2						1	1				
17	SERIC M	2		2									
18	SIGALA M	2			1								1
18	STANGL B.	2		1				1					
19	DEMEKE W.	2			1				1				

[36] Only the authors who published more than one paper are listed in the table

Prof. Rob Law published the highest number of articles (10) related to social media in the domain of hospitality and tourism management. He published every year from 2009 to 2015 on this topic. Prof. Rob Law, affiliated to the School of Hotel and Tourism Management of the Hong Kong Polytechnic University and member of IFITT, published the most articles in a single year with three articles in 2014 and 2011. In 2011 he published all the listed articles with Rosanna Leung which is the author following Rob Law for the highest number of articles published (7) in turn followed by Prof. Dimitrios Buhalis with 6 publications on social media and hospitality.

The great part of the authors publishing more than 2 articles on the topic on which is focusing the review, precisely 12 out of 19, are members or in any way part of the International Federation of Information Technology and Tourism (IFITT). Prof. Buhalis and prof. Cantoni have been former presidents of the past IFITT Board[37]. This undoubtly confirms the fact that a literature review on the impact of social media on hospitality may not have been exhaustive without taking IFITT publications into account.

2.3.2.4 Range of Industrial sectors

Table 2.6 shows the sectors of the hospitality and tourism industry that have been studied in the previous literature. Since the present review is focused on hospitality, the table shows the type of accomodation that have been explored with regard to the impact of social media on the business or to its usage and the managers' perception of it.

Nearly the totality of the articles included in the present review pertained to *Hotels*. In fact, if we consider that a 48% of the publications focused in particular on this type of accommodation but, Hotels are also included into the general categories *all accomodation types* (24.7%) and *small tourism enterprises* (STEs) (9%) we get a total of 81% of the articles focusing on *Hotels* both specifically or generally. A great part of the studies on Hotels concern luxury establishments (33% of all articles concerning hotels). Only a couple of publications are in the context of agritourism or rural tourism, a few concern rooms or homestays.

[37] See <https://www.ifitt.org/meet-ifitt/history> [Accessed: October 2017]

Table 2. 6 Range of Industry Sectors

	SCOPUS	WOS	IFITT	TOT	%
All accommodation types	4	9	9	22	24%
Mixed types	3	4	4	11	12%
STES small tourism enterprises	2	3	3	8	9%
HOTEL	12	16	17	45	48%
Luxury Hotels	4	3	3	10	11%
Hotel Chains	2	3	4	9	10%
Agritourism	0	1	2	3	3%
Rooms	1	1	0	2	2%
Homestays	0	1	1	2	2%
Hostels	0	0	1	1	1%
TOTAL	22	35	36	93	1

Note: the percentage for Luxury Hotels and Chains is reckoned on the total number of articles on Hotels

2.3.2.5 Geography

Regarding the country of origin of the publications focusing on the impact of social media on the hospitality businesses (Table 2.7), the United States are driving the train on the number of articles published from 2008 to present (19). Northern America as a country of origin is followed, by far, by People's Republic of China and the United Kingdom. Many European countries such as Spain, Italy, Austria, Finland and Switzerland are in the top ranking for the number of publications on social media and hospitality. One of the reasons for Austria and the United Kingdom being on the top ranking for the number of articles published may be the fact that the IFITT Headquarters and Secretariatat are in the two countries respectively. While Switzerland was the Country of origin (and the University of affiliation) of the former IFITT President Prof. Cantoni.

Since some publications have been conducted among more than one Country of origin, the total of the counties involved in the present review research is higher than 93.

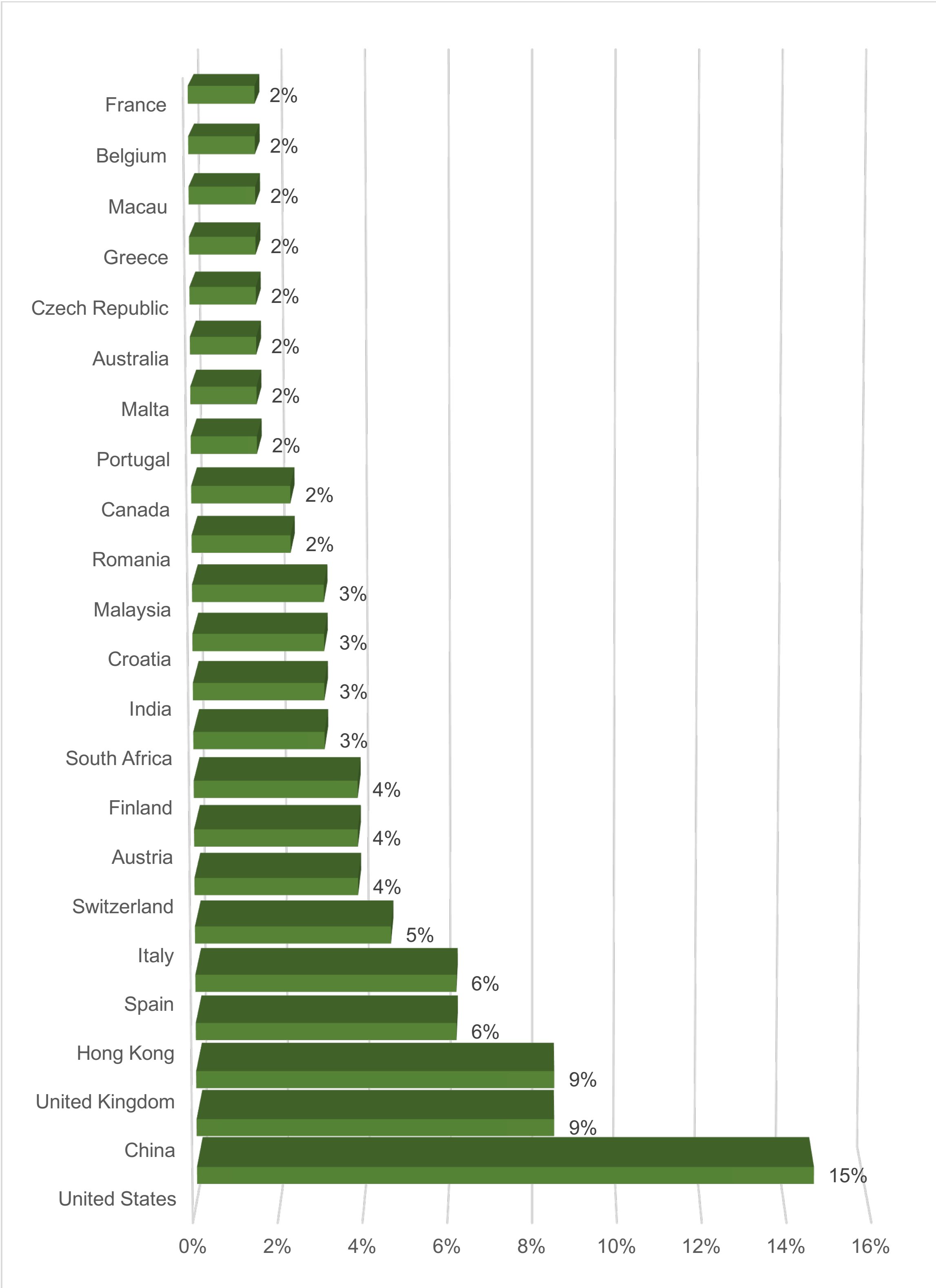
The language of all the publications but one is English. One article is written in Spanish. Anyway, in the first searching stage I found more articles written in languages other than English. Although English is by now the most broadly used language in academic research, I located a couple of atricles written in Russian, in Spanish, French and a few in Chinese.

Table 2. 7 Publications by Country or Territory

COUNTRY	SCOPUS	WOS	IFITT	TOT	%
United States	6	8	5	19	15%
The People R of China	4	4	3	11	9%
United Kingdom	3	4	4	11	9%
Hong Kong	5		3	8	6%
Spain		7	1	8	6%
Italy		3	3	6	5%
Switzerland		2	3	5	4%
Austria			5	5	4%
Finland			5	5	4%
South Africa	3		1	4	3%
India	1	3		4	3%
Croatia		3	1	4	3%
Malaysia			4	4	3%
Romania	2	1		3	2%
Canada	2	1		3	2%
Portugal	1	1		2	2%
Malta	1	1		2	2%
Australia	1	1		2	2%
Czech Republic		2		2	2%
Greece			2	2	2%
Macau			2	2	2%
Belgium			2	2	2%
France			2	2	2%
Taiwan	1			1	1%
Saudi Arabia	1			1	1%
Japan	1			1	1%
Tunisia	1			1	1%
Albania		1		1	1%
Brazil		1		1	1%
Iraq		1		1	1%
Ireland		1		1	1%
South Corea		1		1	1%
Turkey		1		1	1%
Arab Emirates		1		1	1%
Morocco			1	1	1%
Sweden			1	1	1%
Ethiopia		2			
	32	50	48	130	100%

The most frequent countries of production of the publications included in this work, i.e. those showing at least two articles in the time frame considered, are shown in Fig. 2.6.

Fig. 2. 6 Most frequent Countries



2.3.2.6 Type of publication

With regard to the type of publications, I mainly located articles published in Journals for the major part in the domain of hospitality and tourism (see Table 2.4). A total of 45 articles, which corresponds to the 48.4% of all the publications, have been included in the present review.

Table 2. 8 Type of publications

	SCOPUS	WOS	IFITT	TOT	%
ARTICLE	18	27	0	45	48.4%
PROCEEDING PAPER	1	6	37	44	47,3%
REVIEW	2	2	0	4	4.3%
TOT	21	35	37	93	100%

Since I made the choice to include ENTER Conference Proceedings in the reasearch, for the reasons explained above, a rough half of the publications are indeed proceeding papers coming mainly from IFITT database (37). In addition, seven conference papers were located with Scopus (1) and Web of Science (6) databases, for a total of 47.3% of the publications in the review coming from Conference Proceedings.

2.3.2.7 Methodology and design

Fourteen different methods were employed in previous research. The most used study method for the publications included in the review research, is the online survey (Table 2.9) with an increasing trend over the last three years (considering that results for the year 2018 are only partial). Content analysis is the second most used study method, followed by and very often used together with the online observation of data. This is because social media and User generated content provides researchers with a considerable amount of data for analysis and content analysis and online surveys are less time-consuming techniques.

Many of the analysed articles used more than one study method including a two or three stages research method. That is the reason why the total sum of the study methods used is higher than the number of publications included in the review research.

Often, the multiple stage research methods included in-depth interviews as a first step to design a further online questionnaire (survey method) and in a further stage online data observation or content analysis. Most of the articles implying a case study method (both single or multiple case study) used a survey or content analysis or else online data observation to analyse the single or multiple case.

Table 2. 9 Methodology

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Total	%
Content analysis		1	1	2		2	1	2	7	3	2	21	15.9%
Survey	1	2	2	1		2	4	3	8	5	4	32	24.2%
Case study		1		1	1	3	2	3	1	3	3	18	13.6%
Literature review				3	1	1	2	1	1	6	2	17	12.9%
Experiment									1	1		2	1,5%
Secondary data						1			1		1	3	2.3%
comparative analysis						1					1	2	1,5%
grounded theory											1	1	0.8%
online data observation	1	1	1	2		3	1	2	3	2	3	19	14.4%
metrics analytics								2			1	3	2.3%
focus group						1						1	0.8%
benchmarking analysis							1					1	0.8%
panel data model										1	1	2	1.5%
Interview					1	1	3	1	2	1	1	10	7.6%
	2	5	4	9	3	15	14	14	24	22	20	132	100%

Note: Some publications used multiple resarch methods

Non-experiment design is used more often (98%) than experiment design (2%) which is in fact used only in two articles. The ease of gathering a huge amount of data on the impact of social media on the hospitality businesses, directly by observing the online activity or by analysing content or metrics, explains the fact that it is given preference to non-experiment design in this particular topic (Table 2.10).

Table 2. 10 Research methods

Design Method		Count	%
EXPERIMENT DESIGN		2	2%
		2	
NON-EXPERIMENT DESIGN		91	98%
	QUALITATIVE METHODS	39	42%
	QUANTITATIVE METHODS	21	22%
	MIXED METHODS	31	33%
TOTAL		93	100%

The impact of Social media/ICT on hospitality suppliers research remains, anyway, at its infancy stage with only 93 articles published during the review period (11 years). Only one study used the grounded theory, which indicates that theoretical development in social media has not received sufficient attention.

2.3.3 Analytical Literature review

2.3.3.1 Social media literature main streams

Considering Social Media in the Tourism Industry as a general topic in academia, two major research streams are to be found: the use of social media by tourists at different stages of their travel planning process (among others Ayeh, Au, & Law, 2013) and the use of social media by service providers in marketing (Hsu, 2012), product distribution (Thakran & Verma, 2013), customer communication (Levy, Duan, & Boo, 2013), and business management (Sigala, 2012).

A different classification comes from Munar et al. (2103) according to which three main streams of contemporary research can be pursued. The first stream is characterized by exploratory research of social media sites and content and provides classifications according to types of tourism and its activities (Pudliner, 2007; Volo, 2010), type of genre, tourist-generated content, and the tourism experience (Kaplan & Haenlein, 2010; Munar, 2011; Tussyadiah & Fesenmaier, 2009), and types of tourists and country of origin (Enoch & Grossman, 2010; Wenger, 2008).

A second stream of research examines the relationship among social media, decision making, and information search. Consumer-centered research approaches are also adopted in other studies of electronic word-of-mouth and location-based services (Lee & Tussyadiah, 2010; Tussyadiah, 2012) and articles that analyze tourists' behavior on review sites and recommendation systems (Bronner & de Hoog, 2011; Yoo & Gretzel 2008; Zhang et al., 2010). Moreover, scholars have examined the impact that social media sites have on travel information search and choice of destination (Fotis et al., 2011; Jacobsen & Munar, 2012; Xiang & Gretzel, 2010) and indicate the increasing role that electronic word-of-mouth plays in consumer decisionmaking processes (Litvin et al., 2008). These contributions, offer a descriptive mapping of the consumer behavior.

A third stream of research takes a supply-oriented perspective, dealing with the challenges that tourist-generated content represent for destination marketing organizations and tourism firms. Munar (2011, 2012) presents a model of generic strategies used by these organizations to interact with the virtual world of social media. Other studies describe patterns of technology adoption of the industry and discuss the challenges that tourism organizations face when wanting to use social media for communication, promotion, or product development (Ayeh et al., 2012; Hvass & Munar, 2012; Schmallegger & Carson, 2008; Xiang & Gretzel, 2010). Finally, there is also evidence of novel approaches scrutinizing the collective, virtual value creation between providers and consumers, for instance on festival social media (Larson & Gyimothy, 2012).

In any case, social media are approached mostly from a business administration perspective, where contemporary studies on tourism and information technologies (IT) are informed by frameworks developed in management and marketing theory. This has resulted in the dominance of a (post) positivistic methodological approach in articles and textbooks (Sigala et al., 2012) and the emergence of research networks (such as the International Federation for Information Technologies in Travel and Tourism or the ENTER conferences), driven by an applied business research agenda. These communities are similar to academic groups (Tribe, 2006) as they perpetuate one particular ontological view on technology and tourism and often act as gatekeepers of research production and distribution (Munar 2013).

As far as the content of social media research is concerned, previous studies have analyzed four major issues (Lu, Y., Chen, Z., & Law, R., 2017):

(1) Role and effects of social media: studies in this stream include the topics on social media adoption; the extent of social media use; the practices of social media use; the influences of social media on marketing, promotion, distribution, communication, and CRM and their effects on Hotel booking and market shares.

(2) Behavior of social media users: previous studies examined the motivation, perceptions, attitudes, where social media are used, what social media are popular, preferences, trust, perceived valence, travel planning behavior, decision-making, and engagement in social media of the browsers or sharers. The differences in the use of social media were explored based on the characteristics of generations, nationalities, and gender.

(3) Social media content: one line of research analyzed salient attributes, message characteristics, and content categorization (e.g. sales or conversational categories). Another line of research examined relationships, such as the relationship of online ratings and Hotel price, locations, and quality of service.

(4) Literature review: researchers reviewed the role of social media across different eras of information technology, methods for analyzing blog narratives, and the influence of eWOM.

The present study is to be set in the stream of the supply-oriented perspective analysis (Munar et al., 2013), since it deals with the challenges and the impact that social media represent for hospitality firms. And, agreeing with Lu et al. (2017) classification, this work may be set in the stream of literature analysing the Role and effects of social media, since its major topics are: social media adoption (use), the perception of social media by hospitality managers and the impact of ICT on the accomodation businesses.

2.3.3.2 Literature on the impact of social media on hospitality firms, its usage and the perception of it

While there is a growing body of research on social media in hospitality and tourism journals, most of the existing studies focused on the role and use of social media in travel information (Xiang & Gretzel, 2010: Ayeh et al. 2012) or on the consumer behaviour. Accordingly, the research on the impact of social media on hospitality firms in extant literature is limited in both its depth and breadth.

Moro and Rita (2018) in their work about *Brand strategies in social media in hospitality and tourism* (Review) contend that a large research gap was found in hospitality and tourism. Also, Leung, Sun and Bai (2017) in their work *Bibliometrics of social media research: a co-citation and co-word analysis*, called for a future research agenda on social media research in the hospitality/tourism field. Ayeh et al. (2012) contended that there is limited research addressing how hospitality service providers perceive and employ social media to influence the consumer's decision making process.

The above statements are confirmed by the present research. In fact, despite the huge number of publications (963) located with the research key words (hospitality OR accomodation AND social media OR ICT), only a 9.6% turned out to concern the impact of social media on the accomodation businesses and the use and perception of ICT by the hospitality managers. While a great part of the excluded work was about the consumer behaviour or the destination management.

In particular, with regard to the three research questions set for the present review, very few publications among those included in the work, are dealing with *the impact of social media on the hospitality firms*, which is the third research question. More articles were found to be focusing on the hospitality managers' *use and perception of social media* in general, or of one or more specific tools (Fig. 2.11). But still few considering the wide time frame set (2008-2018).

2.3.3.2.1 Topics

As "social media outlets are numerous and varied" (Mangold & Faulds 2009), also literature issues concerning social media are many and varied.

The review research returned an outcome of 18 different specific topics, plus the two general issues connected to the research questions: *the use of social media by hospitality companies; their perception of social media and the impact of ICT on hospitality businesses* (Table 2.11). Having found only few articles per each specific topic, it turned out it was hard to discern main trends other than those connected to the general issues connected to the research questions.

The most recurring topic in the previous literature about social media and hospitality suppliers is the *social media usage and the perception of it*. A 23% of the publications included in the research, focus on the use or on the integration of social media by hospitality businesses. In addition, another 8% of all articles, do concern the usage of a specific social media tool, such as a social networking site (Facebook, Twitter, Sina Weibo, etc.), online booking (Saafa and Berard, 2014; Schegg et al., 2013) or e-commerce (Oliveira, 2016; Hua, 2016; Fuchs et al., 2014) or else with the use of social media for marketing purposes (Moro and Rita, 2018; Oji, Iwu and Haydam, 2017; Matikiti, Kruger and Saayman, 2016).

The type of accomodation investigated on this issue is, nearly in all cases, *hotels,* apart for 3 papers concerning *rural tourism* (Lim, 2011; Pesonen, 2011 and Havlicek, Lohr and Benda, 2010) and one concerning *ski resorts* (Daries-Ramon et al., 2017).

Although this general issue is dealt by scholars since the beginning of our time frame and maybe beyond, the number of articles on this topic is on the rise since the year 2016.

Social Networking Sites in the perspective of hospitality suppliers appears to be a recent issue among scholars, as well as work on *user generated content* (UGC).

Researchers only began to study *electronic Word of Mouth* and *online reviews* in the perspective of accomodation companies in recent years (since 2015). *Online reviews*, in particular, is the most studied specific topic. A 13% of the publications focus on online reviews management and on how hospitality businesses cope with the consumers' negative reviews. Another 6% of all publications included in the research, study the use and, effects of using, Tripadvisor as the most widely used and trusted online reviews social media tool (e.g. Niu and Fan, 2018; Xie, Kwok and Wang, 2017; Philips et al., 2017 and Xie et al., 2016;). This means there is a growing attention on the interaction between tourists and the lodging suppliers through social media.

Table 2. 11 Specific topics about Social media

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Total	%
ICT/social media usage/perception	1		1	1	2	3	3	1	6	8	4	30	23%
Social media/ICT impact (return)			1	1			1	5	2	4	3	17	13%
Big data										1	1	2	2%
SM for marketing purposes			1	2			1		3	2	2	11	8%
Websites		2		2	1	1	3		2		1	12	9%
Online presence		1	1		1	1	1			1	1	7	5%
Online booking			1	1		3	1					6	5%
E-commerce		1	1				1		1			4	3%
Social CRM	1								1			2	2%
UGC													
eWoM (word of mouth)								1	1	2		4	3%
online reviews								3	2	4	3	12	10%
Specific social media (SM)													
SNS in general						1					2	3	2%
Tripadvisor								1	4	2	1	8	6%
Facebook				1			1	2	2		1	7	5%
Twitter									2			2	2%
Instagram									1			1	1%
Sina Weibo									1			1	1%
Expedia										1		1	1%
Yelp										1		1	1%
Ebay							1					1	1%
TOTAL	2	4	6	8	4	9	13	13	28	27	19	132	100%

Note: Since many publications were dealing with more than one topic the sum is higher than 93.

A more recent and smaller part of the literature (13%) is dedicated to the impact of social media and ICT on the hospitality businesses. A turning point in the literature on this subject is the year 2015. Studies in this stream mainly deal with the return on social media investments in terms of time spent or money paid, moving away from purely financial impacts such as ROI, RevPAR[38] or business performance (Xie, Kwok and Wang, 2017; Buhalis and Mamalakis, 2015; Kim, Lim and Brymer, 2015), passing by the effects on the lodging peformance (Caruana and Farrugia, 2018) and seasonality (Boffa and Succurro, 2013), to non-financial impacts such as those on the company's reputation (Camilleri, 2018; Capatina 2018) or on other immaterial assets (Gan, Inversini and Rega, 2018).

2.3.3.2.2 The impact of social media on hospitality firms

According to the literature included in this review research, the impact of social media is overall very positive both directly and indirectly.

Starting from the purely **financial** impacts, Buhalis and Mamalakis (2015), for instance, studied the Social Media Return on Investment and Performance through Social Media marketing strategies in the Hotel Industry Context using Princess Andriana Hotel in Rhodes, Greece as a case study. They measured ROI into two forms, financial, and non-financial. As for the financial ROI they assessed that Social Media can indeed generate hard revenues for a business. "All promotion platforms can be utilized either as selling points, or as promotional tools. The innovative functions of the Facebook instant booking as well as the direct booking through messages, provide extra purchase potentials to the user by avoiding unnecessary transitions to other websites". In regards to non-financial ROI, their findings demonstrated very satisfying levels of engagement (engagement is the most important element of the non-financial ROI) and brand reputation especially through Facebook, as it stands as the most popular and multidimensional platform.

Fuchs et al. (2014) targeting the Austrian hotel sector, analysed the impact of using online auction sites such as Ebay to sell accomodation packages and assessed that the strongest effect identified from online auctions on firm performance was the perceived impact on sales. Also, the impact on ‘‘other benefits’’, like customer satisfaction, cut down transaction cost, was highly significant.

[38] ROI: return on investment; RevPAR: revenue per available room

Kim, Lim and Brymer, (2015), instead, assessed how managing online reviews affects hotel performance. The better the overall ratings and the higher the response rate to negative comments, the higher the hotel performance. Therefore, the authors contend, online reviews in social media, specifically overall rating and response to negative comments, should be managed as a critical part of hotel marketing.

The findings of the research by Park and Chen (2017) focusing on 689 hotels located in London, UK, identified a complementary effect of consumer rating between neighbouring hotels, and showed the spatial dependency of room prices across hotels at the destination.

On the same issue, Xie, Kwok and Wang, (2017) studied the varying effect of managerial responses on lodging business performance. In their work they analyzed nearly eight thousand managerial responses and 50.000 online reviews on TripAdvisor, which were matched with the financial performance data (revenue per available room [RevPAR]) for 2,652 hotels in 427 cities in Texas from 2005 to 2011. All hotels observed an increase of RevPAR as they posted more managerial responses to online reviews, but the effect of different types of managerial response strategies varied according to their product characteristics (hotel class).

Boffa and Succurro (2013) found that ICT has a positive effect on seasonality both in hotels and other types of accomodation, but the impact is quantitatively larger for hotels.

Regarding the **non-financial** impact of social media on hospitality firms, an interesting study by Capatina et al. (2018) shows that social mentions[39] have a significant positive effect on accommodation brands' ranking, especially in terms of online branding strategies. The study is a cross-country comparison of relationships between social mentions and the ranking of the top accommodation brands in Romania and Tunisia in terms of number of Facebook fans and explains that solutions for accommodation brands' online success in social media have a specific configuration pathway, which is sufficient to predict high rankings on Facebook. Thus, considering social mentions as the consequence of online branding strategies, the paper indirectly examines the impact of those strategies on the brand visibility and reputation of the accomodation firms.

[39] Social mentions, reflecting how often brand-related information is shared and talked about on social media, contribute significantly to a brand's ranking on major social networks (Capatina et al. 2018).

Camilleri (2018) suggests that communication of responsible tourism management is more effective when it is offered through interactive channels. This implies that there are opportunities for hospitality businesses to enhance their reputation and image as they engage in interactive communications with different stakeholders.

On the other hand, Gan, Inversini and Rega (2018) in their study about Malaysian homestays, revealed that the use of digital technologies has a direct and indirect impact on each and every livelihood asset by (i) enhancing the training possibility of the human assets, (ii) expanding the community’s internal and external network, (iii) enhancing the communities’ physical assets (such as mobile phones to be involved in the homestay management), (iv) engaging public opinion on natural/environmental discourse and (v) supporting cost-effective promotion and management.

Thus, the previous literature, although scarce and non all-encompassing, reveals an overall positive impact of social media on both financial and non-financial assets of the hospitality firms. Unfortunately, no studies but one (Gan, Inversini and Rega, 2018), among those collected on this issue, deal with other accomodation types than Hotel.

2.3.3.2.3 The use of social media and the perception of it

Although scholars have demonstrated the overall positive impact of social media on hospitality industry, previous research on its usage and on the perception of it by accomodation managers, reveals a general lack of awareness. The studies included in this review identify, in particular, a lack of knowledge and capabilities and an underuse of social media by the hospitality firms. Since the underuse and the lack of knowledge or awareness are connected together, being, often, the first a consequence of the latter, the discussion that follows will consider the two issues jointly. The extant literature reviewed in this work revealed a similiar scenario in many different Countries of the World, with just a few exceptions from the Asian Hospitality Industry.

In an ever changing and rapidly evolving digital landscape, the literature produced over a decade on the use of social media or on its impact on hospitality businesses may have changed view and perspectives many times. An article written in 2008 may be completely out-of-date today, but what matters for the general purpose of this review research is to identify some main streams and to explain the literature evolution. A wide time frame allowed, indeed, a more accurate description of the various literature trends (see 2.3.2 Descriptive Literature review). But, for the in-depth analysis review that follows, the most recent literature production is certainly more appropriate to illustrate the state-of-the-art about the two issues. Thus, studies published in the last five years will be taken into consideration here, unless the earlier ones represent a missing piece in the scenario.

Moving from the literature concerning the European hospitality Industry, Minazzi and Lagrosen (2014), investigated the use of social media among 15 leading European hotel brands. First through semi-structured interviews with head managers and then analysing the strategies used on their Facebook pages, they assessed that though social media is considered a useful instrument to promote the hotel brand, the potentiality of customer engagement is still undervalued. They confirmed that Facebook is the most used social media among the top European Hotels but the potentiality of engagement that could increase customer loyalty, electronic word of mouth and ultimately sales, is so far undervalued. Hotels are still in the first stage of developing social media strategies and present a moderate level of integration among different media. Also, despite the actual trend being the development of new devices (smartphones, tablets, etc.) along with increased connectivity, hotel brands do not seem to be latching on to the importance of this phenomenon.

Leite and Azevedo (2017) found that the managers of 59 four and five stars Hotels in Porto (Portugal) still do not take advantage of the full potential of digital marketing tools.

Similarly, Caruana and Farrugia (2018) in their study on five-star hotels in Malta, suggested that further investment in training in social media use and analysis of the data generated by social media is required. Up till the time of the study very few analysis tools were used to their full potential. Hotel operators are challenging to maintain the level of engagement with the customers and above all, they do not have good knowledge on how to measure their level of engagement with the customers.

Still, with regard to the European hospitality industry, Jung, Ineson and Green (2013) conducted semi-structured interviews with the persons responsible for the management of social networking in 10 luxury hotels and acknowledged that the full potential of online Social Networking Sites has yet to be realised in terms of hotel marketing.

Rabie, Cant and Machado (2016) explored the current use of social media among star-graded accommodation establishments in the Western Cape Province of South Africa, and revealed that social media are used by the firms but that they are still learning how to fully and successfully implement social media platforms in their area of business.

Demeke, Olden and Abdelnour Nocera J. (2016) show how the adoption or rejection of ICTs by small hotels in Addis Ababa (Ethiopia) is largely due to political, socio-economic, technological and legal factors. Their study indicates that, among other factors, both the political decision on the telecommunication market structure and the economic decision to impose a 40 % tax on ICT tools directly influence the adoption or non-adoption of ICT by hoteliers.

According to Ayeh J.K., Leung D., Au N. and Law R. (2012) the situation seemes to be different for tourism and hospitality service providers in Hong Kong. There, early in 2011, the accomodation managers already generally understood what social media represents and recognised their potential for business promotion as well as inherent challenges. Furthermore, they were employing various social media applications and strategies in attempting to influence consumers' decision making process.

Anyway, Leung D., Lee H., Fong L.H.N. and Law R. (2014) found that Hong Kong hotels were, at that time, not in line with the visibility on smartphones, although smartphones were gradually becoming the primary Internet access device for travellers to research and purchase hotel accommodations. More than half of Hong Kong hotels had optimised their websites for iOS- and Android-operated smartphones, nevertheless, only a handful of hotels had developed smartphone apps for connecting with customers. Star rating and brand affiliation turned out to be associated with the visibility of hotels on smartphones. In four years the scenario is certainly changed but the review research in the three selected databases did not produce more recent work on this topic for the same geographical area to allow a comparison.

Gan, Inversini and Rega, 2018 found that Homestays in Malaysia are consciously using ICTs and the internet to develop their communities. ICT are mainly used as functional and operational enablers with a clear focus on sales and marketing, using various platforms (Facebook, e-mail, chat app, etc.). E-mail is used for external communication as a definitive means of communication and confirmation of reservations. An earlier study (Hashim, Kassim, & Murphy, 2008) suggested that Malaysian hotels late to adopt websites leapfrogged the early adopters in their addition of website features. A later study of the same author (Hashim and Fadhil, 2017), differently indicated that five star Hotels in Malaysia are not utilizing Facebook platfom at its fullest potential.

In a recent work Kirsi Meriläinen (2017) assessed that ICT uptake benefit and transforms the organisational capabilities of a company in the sense that the use of ICT-based tools transforms digital marketing capabilities from a set of abilities that enables tourism SMEs not only to float in a web-marketing stream, but also to lead such a stream. In simple words it is a learning by doing process.

An interesting study by Xu, Buhalis and Weber (2017) assesses the fact that tourism gamification is still in its infancy and its applications are mainly in DMO, tourist information services or museums. However, they report two examples of its application in the hospitality industry, both in the Marriott International Hotel Group[40]. Starwood Hotels, used the online gaming community of 'second life' to test their new hotel brand W-hotel as a platform to collect game players' opinions about the hotel design. Also, the Marriot Hotel Group launched a game based on Facebook, the 'Marriot my hotel', where players were able to play as managers of a "virtual" restaurant in the hotel. The aim of the game was to get people to know the operation of hotels, generate interests to work in hotels, and stimulate new staff training for human resources. The importance of gamification, virtual reality and augmented reality have been recognized (WTM predicted gamification as a popular trend for tourism in the early 2011) and discussed by scholars (Yovcheva, Buhalis, & Gatzidis, 2013; Gretzel & Jamal, 2009; Chaffey & Ellis-Chadwick, 2012) as important trends for marketing. Since they

[40] At the end of 2016 Marriott International (MI) purchased Starwood Hotels & Resorts Worldwide for $12.2 Billion dollars. This makes it the largest hotel chain in the world. MI now controls 30 different brands, almost 5,800 properties and 1.1 million rooms in more than 110 countries worldwide. Source: <https://www.hospitalitynet.org/opinion/4080250.html>; <https://www.cnbc.com/2016/09/23/marriott-buys-starwood-becoming-worlds-largest-hotel-chain.html> [Accessed: September 2018]

offer technology mediated experiences, making experiences richer and more participatory, they allow tourism companies to meet tourists desire for more personal, unique and memorable experiences, which require a deeper engagement and a multi-sensory stimulation. Anyway, besides these very few best practices, the general lack of capabilities and of awareness about these new technologies and their underusage by the hospitality managers are in line with the scenario depicted above with regard to all type of social media.

2.4 Conclusion

As Tranfield et Al., 2003 contend, in management research, the literature review process is a key tool, used to manage the diversity of knowledge for a specific academic inquiry. The aim of conducting a literature review is often to enable the researcher both to map and to assess the existing intellectual territory, and to specify a research question to develop the existing body of knowledge further. This is what I did, I investigated the exisiting literature to understand where the research had a void to fill. And since the research on the impact of social media on Hospitality firms is limited in both its depth and breadth, I will try to bridge the disclosed gap with the empirical research illustrated in chapter 3.

This study revealed the state and trend of current research on social media in hospitality and tourism management, using a quantitative content analysis approach and a systematic review process.

While there is a growing body of research on social media in hospitality and tourism journals, bringing to an overload of publications on the topic, very few articles do concern the suppliers perspective and in particular the impact of using ICT and social media on the accomodation firms. Kim et al. (2009) suggested that “both the hospitality and tourism academic areas are maturing, and not relying as heavily on other disciplines”, however, social media research focusing on the supply-perspective remains limited despite its increasing use by tourists and the importance of understanding the role of social media in hospitality and tourism. A total of 93 publications turned out to be eligible for inclusion in the review. Only a scarce 9.6% out of all articles located using the systematic review process, in the time frame from 2008 to present, from three databases (Scopus, Web of Science and

IFITT).

The descriptive review allowed examination of the 93 articles and proceedings based on different dimensions: the number of publication by year, the number of publications in journals, industry sectoral focus, research methodology and design, type of publication, geography, authorship and social media topics. Being the literature included in the review so limited in depth and breadth, it was quite difficult to discern main trends based on the above dimensions. The most notable considerations are discussed in the followings.

The publication-per-year dimension, for instance, followed different paths among each of the three databases. In general it showed that the attention on the impact of social media on the hospitality businesses and more generally on the suppliers perspective was almost insignificant until the year 2012, then it widely increased in the last two years.

The publication-per-journal dimension asserted that more than half of the articles were published in leading hospitality and tourism journals, indicating that social media research was mostly of high quality.

The authorship trend revealed that the great part of the authors publishing more than 2 articles on the researched topics (12 out of 19), are members or in any way part of the International Federation of Information Technology and Tourism. IFITT is the leading independent global community for the discussion, exchange and development of knowledge about the use and impact of new information and communication technologies (ICT) in the travel and tourism industry. Being it such an important worldwide eTourism knowledge hub, a literature review would not be exhaustive without taking its work into consideration.

The dimension concerning the range of sectors of the Hospitality industry, revealed that nearly the totality of the articles included in this review pertained to *Hotels,* which are mainly luxury hotels. A 48% of the papers investigate Hotels specifically, another 45% deal with the accomodation establishments in general. Only a couple of publications are in the context of agritourism or rural tourism and a few concern rooms or homestays.

The United States, The People Republic of China and the United Kingdom are the top Countries of origin of publications on the use and impact of social media on the hospitality industry.

Qualitative methods or mixed methods are the most used in the design of research on social media in the hospitality industry. Survey and content analysis are the most employed methodologies and these are often used jointly in a research. The huge availability of online data for analysis puts the content analysis and the online data observation among the most preferred research methods in this field.

In the analytical review in-depht analysis was conducted based on the research questions and across the research topics. The major part of the publications included in the review concern the usage and the perception of social media by the hospitality firms. Usage and perception are very often dealt jointly, making it difficult to separate the findings about the single issues. A more recent and smaller part of the literature is dedicated to the impact of social media on hospitality businesses.

According to the literature included in this review research, the impact of social media is overall very positive, both for Hotels as for Homestays or other accomodation types (considered as a whole). This is revealed by financial measurements such as the return on investment (ROI), the revenue per available room (RevPAR) and the business perfomance, as well as by non-financial measurements such as the reputation, visibility and other immaterial assets. No article was found in extant literature demonstrating a negative impact of social media on the hospitality industry. Despite this, accomodation managers have a low perception of the potentialities of ICT and underuse it for marketing purposes.

Previous research on the usage of social media by accomodation companies and on managers' perception of it, reveals in fact, a general lack of awareness. The studies included in this review identify, in particular, a lack of knowledge and capabilities and an underuse of social media by the hospitality firms. This is true for many Countries of the World from Europe to Africa, with just a few exceptions for the Asian Hospitality Industry.

Finally, there is a growing attention on the interaction between tourists and the hospitality suppliers through social media. Researchers only began to study *online reviews* management in recent years (since 2015), but in this work it turns out to be the most investigated specific topic.

2.5 Limitation

This study has some limitations that need to be pointed out.

First, the research reviewed articles from 2008 to present. I assumed the review of literature beyond these years, may have been out-of-date, given the very fast evolution of social media. Anyway a longer time period may possibly allow a more precise framing of the single trends.

Second, and certainly the most important, the research is not exhaustive. The systematic review was limited to three databases and a few subject areas. No doubt, more articles eligible to be included in the review, may have found enlarging the selection criteria. Even if a first scoping on other online archives was done and the three chosen databases seemed to be the most comprehensive ones, for the topic and the Business and management research area, I may certainly have found more publications extending the search to other databases or else inquiring the non published work. Also, the review only investigated three main subject areas: Business, Management and Accounting; Social Sciences and Economics, Econometrics and Finance. Anyway other areas such as Computer Science or some Interdisciplinary area, may have returned some more articles eligible to be included in the review. However, when a researcher is coping with a review on such a vast, common and fast evolving issue as social media is, there is a high risk of getting lost, if boundaries are not set.

Third, this study analyzed social media research based on several dimensions: the number of articles per each year from 2008 to 2018, the number of articles in each journal, type of publication, sectoral focus of each work, research methodology and design, authorship trends and topics. Other dimensions (e.g. citations, affiliations, etc.) were not explored and could be areas for future investigation.

2.6 Future research

First, some of the future prospects for research have been anticipated above and concern the possibility to enlarge the selection criteria and to inquire more databases rather than extending the research to more subject areas, to gather a more comprehensive view of social media literature for analysis.

Second, the findings of the systematic review suggested some other areas for future investigation. Great part of the existing literature on social media concerns specifically the Hotel Industry. Moreover, social media use in the hotel sector is explored mostly in the context of luxury or star hotels, especially four- or five-star hotels. Social media use in other types of accommodation, such as small hotels, bed and breakfasts, agritourism and so on, has not been investigated. Further research on the usage of social media in other types of accomodation companies is therefore highly recommended. Also, a comparative research on the behaviour of suppliers from all the different accomodation types on social media would be advisable.

Third, the findings about the three research questions revealed the need of more investigation on the impacts of social media on the hospitality suppliers. In particular, further enquiry on the non-financial impacts of the use of social media should be desirable.

Fourth, although literature on User Generated Content management by hospitality companies is on the rise, it mainly deals with online reviews and Tripadvisor. The present study found that many UGCs on social media, such as photos and videos about trips, or other media and tools have not been investigated sufficiently in the suppliers perspective and could be interesting topics for further exploration. Instagram photos posted by tourists, for instance, provide a considerable amount of data for analysis that has not yet been investigated. Also, Pinterest, is a relatively new social media where loads of useful information about travel and destinations is posted and tourism suppliers may manage their presence there to attract and get useful information about the consumers. However, it received insufficient attention.

Fift, literature on gamification, virtual reality and augmented reality applications in the hospitality industry is still at its infancy, but, considering the potentiality of this new technologies in social media marketing for tourism, further research is highly recommended.

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Chapter 3

SOCIAL MEDIA
in the
HOSPITALITY INDUSTRY
an
EMPIRICAL RESEARCH

3. Abstract

No doubt about the fact that Information and Communication technologies (ICT) and social media have deeply impacted on the way people communicate nowadays. Providing channels that contribute to the interactions and transactions between consumers and businesses the internet has drammaticaly changed the market rules. Particularly in tourism and hospitality, as an information-intensive industry, advances in ICT have brought unprecedented opportunities and challenges.

The purpose of this study is to ascertain whether the accomodation companies are riding the wave, taking advantage of the opportunities offered by the ICT implementation. In particular, the extent to which the Italian Medium Adriatic hospitality firms use social media and their familiarity to it, have been investigated.

All type of accomodation establishments of the regions Emilia Romagna, Marche and Abruzzo have been invited to answer an online survey in 2016.

Results, show that the 626 respondent firms, invest little in social media training or in business promotion. They do not fully perceive the potentiality of social media, missing tons of opportunities. As a consequence, many companies have not implemented a social media strategy and do not use metrics to measure the impact of their activity.

The main challenges for hospitality managers appear to lie in the lacking of awareness, thus of digital skills.

This work bridges a literature gap by investigating all type of accomodation and moreover, offering a comparison in terms of behaviour towards social media, among the different establishments.

Key words

Social media; Information Communication Technologies (ICT); tourism; social media marketing; hospitality; accommodation.

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3.1 Methodology

Trying to explain if hospitality managers are coping with the threats, challenges and opportunities offered by ICTs and, more precisely, the extent and practice of their social media use, this work is to be set in the stream of research that takes a supply-oriented perspective. In particular, it has to be set among the studies that enquire the Role and effects of social media. As it was assessed by the literature review in chapter 2 research in this field is still limited. Moreover, insufficient attention has been given until now on the use of social media by other accomodation types, than Hotel and to the comparison among different establishments. A non-experimental exploratory quantitative research design was used to conduct the survey.

A lot has been written about how tourists have drammatically changed their way of making tourism thanks to ICTs and social media and about their need to socialize and interact with tourism suppliers. But are hospitality managers prepared for this? First of all, do they believe in the potential of social media and secondly, do they have the required set of competencies in order to take advantage of the opportunities offered and to manage the threats hidden by social media marketing? The aim of this study is to ascertain whether the accommodation companies in Italy are familiar to social media and the degree to which they are using this form of communication. Taking the Tracy L. Tuten, Michael R. Solomon's Social Media Marketing textbook[41] as a starting point, the following research questions have been formulated:

1. To what extent are hospitality managers using social media?
2. Do they have a social media marketing strategy?
3. Do they measure the impact of social media on their business?

1. To what extent are hospitality managers using social media?

The aim of the first research question is to understand whether and how the Hospitality companies of the Medium Adriatic use social media. Which is their level of familiarity with social media and their awareness about the immense potential the ICTs offer.

[41] Winner of the TAA 2017 Textbook Excellence Award

Tuten and Solomon (2013) outline "Four Zones" of social media that marketers can use to achieve their strategic objectives (Fig. 3.1). These four zones are alternatives of how to use social media, but the zones overlap each other and create a suitable mixture for each purpose. The grouping proposed by the authors includes:

1. Community (e.g. Facebook, Instagram, etc.)
2. Publishing (e.g. Tumblr, Youtube, Twitter, Blogs, etc.)
3. Entertainment (e.g. Candy Crush Saga, Come2Play, etc.)
4. Commerce (e.g. Groupon).

Fig. 3.1 The Four zones of Social Media

Tuten, Solomon, 2014

Social Community refers to relationships and common activities internauts are taking part in. The primary reasons why people are willing to take part in social communities are relationship building and interaction. This first zone includes for example Social Networking Sites (from now on SNS) and forums. These channels allow users to create their own social identity by using a profile picture and sharing basic information about themselves. Profiles can collect connections, such as friends, followers or fans from other members of the social community. The best known channels of social communities are Facebook, LinkedIn and Twitter. (Tuten & Solomon 2013, 4-7)

Social Publishing sites are used to share information to a bigger audience. The channels of social publishing include blogs, microsharing sites, media sharing sites and news sites. Blogs can be maintained by an individual or organizations. What makes blogs social is that they are open for discussion. People can leave comments on texts or share the posts in social communities. Microsharing sites (such as Twitter) can be seen as blogs, but with limited length of text. Media sharing sites host content, but also videos, music, photos and other media. A well known video sharing media, which is very much used in BtoB marketing is Youtube. (Tuten & Solomon 2013, 4-7).

Social Entertainment zone is made of immersive engaging experiences (including video, music, multi-player gaming) incorporating social networking services or linking back to social networking websites to help connect users. These include social games and gaming sites, (Come2Play, SecondLife) socially enabled console games, alternate reality games (ARGs), virtual worlds, and entertainment communities. Though social entertainment is still developing as a channel, social entertainment communities will develop around other traditional areas of entertainment in the near future, such as film, art, and sport. (Tuten & Solomon 2013, 6)

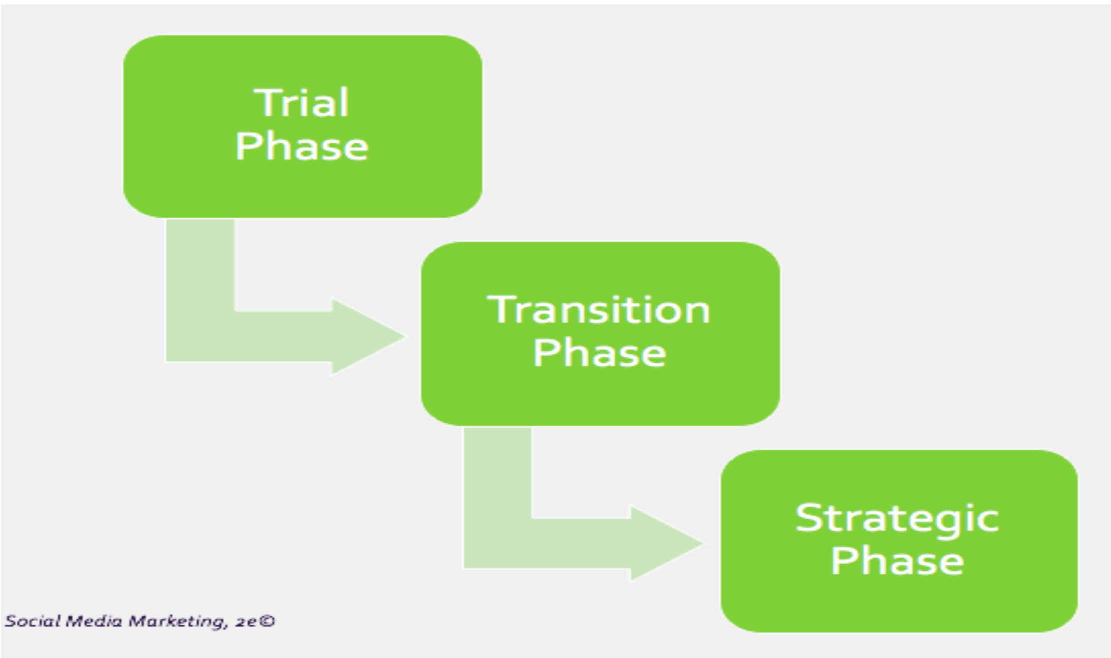
Social Commerce zone focuses on the use of social media to assist the online buying and selling of products or services. Social commerce is not only about online shopping, but about reviewing and rating the bought products and the service provider. It is also possible to use social media applications to share the shopping experience, which also helps the companies collecting feedback from their services. In tourism and hospitality TripAdvisor is certainly the most used site for sharing the consumers' reviews about Hotels, restaurants, other attractions and destinations. (Tuten & Solomon 2013, 6 & 166-173). Reviews help consumers assessing the risk of purchase and verify the providers' trustworthiness. (Tuten & Solomon 2013, 6 & 166-173). Taking Tuten and Solomon's four zones framework as a basis, we designed the survey asking closed questions with response categories referring to the different activities that may be played on social media for each of the above zones.

2. Do they have a social media marketing strategy?

The second research question was asked to understand in which stage of Social Media Marketing Maturity (Tuten, Solomon, 2014) the firms are to be set. According to the authors a firm may find itself in different stages of maturity at a time in their approach to social media marketing (Fig. 3.2).

The Trial Phase, which is the first step in the maturity scale, is an exploratory stage in which companies just open one or different accounts and try to manage their presence on the net, mostly without following an editorial plan or calendar, i.e. the social media platforms are set up before any real goals or objectives have been planned for them. In this phase, businesses generally do not have any sort of guidelines or processes for their social media strategy.

Fig. 3.2 The stages of social media marketing maturity Tuten and Solomon (2014)



The Transition Phase is a stage in which businesses have some sort of process, although casual, and will randomly perform social functions with little guidelines. In this phase there usually is some idea of what needs to be done and how to go about completing the tasks but there may not yet be enough resources (time, money, knowledge or competencies) to implementing a strategic social media marketing plan.

The Strategic Phase. The strategic phase is the highest level of social media marketing maturity, and is what every business should strive for. In this phase, a company has an organized process with thorough guidelines. Additionally, all tasks are performed routinely and are shared among different areas following precise and unique goals. Every single social media platform used in this phase has a specific plan and functionality and all content is published according to an editorial calendar. As an ideal model the social media marketing strategic plan should be integrated and go together with the general marketing plan as well as with the company's strategy.

3. Do they measure the impact of social media on their business?

The third research question tries to deeper understand the degree of awareness that tourism and hospitality organizations have about the role and effects of ICTs. According to the Oxford dictionary, Awareness *is the concern about and well-informed interest in a particular situation or development*. This means there must be concern and will to understand a matter, to tell there is awareness of it. From a management perspective, 'understanding' social media is a prerequisite for properly managing these channels and *measuring is the first step that leads to control and eventually to improve*[42] their impact. But measuring is still not enough. A measurement, without context, is merely a number. When compared with the company expectations or the competitors' efforts or any other goal, then, that number becomes a metric, indicative of value, importance or a change in results. Thus, without context a measurement is meaningless, at the same time without a specific and SMART[43] business goal a metric is meaningless[44] (Sterne, 2010). If a metric is central to the

[42] As H. James Harrington said speaking of Business Process Improvement Methodology, (1991) „Measurement is the first step that leads to control and eventually to improvement. If you can't measure something, you can't understand it. If you can't understand it, you can't control it. If you can't control it, you can't improve it".

[43] A SMART goal should undergo the following guidelines: 1) **S**pecific – define exactly what is being pursued, 2) **M**easurable – is there a number to track completion? 3) **A**chievable - can the goal be achieved? 4) **R**ealistic – doable from a business perspective, and 5) **T**imely – can it be completed in reasonable amount of time? (Williams, 2012). Over time the SMART acronym experienced changes to become SMARTer with **E**xciting and **R**ecorded becoming additional characteristics supporting goal development activities.

[44] As Jim Sterne said in his book Social Media Metrics (J. Sterne, 2010), "Social media is not doing any good for a company unless managers can tell if the results are an increase in revenue, a lowering of costs and/or

well-being of a business, it might be considered a Key Performance Indicator (KPI). To be a KPI, it must indicate how well the organization's goals are being served. Therefore, it should be crucial to map out the specific business goals, possibly defining a strategy (getting into the strategic phase of the Tuten and Solomon's social media marketing maturity stages), before embarking on a social media program[45].

Marketing metrics have been defined as tools which help companies quantify, compare, and interpret their own performance from marketing activities (Kotler & Keller, 2007). Now, Social media formats have revolutionized marketing measurement, producing an abundance of data, meaningful metrics, new tools, and methodologies. Each application, each site and social network store vast amounts of behavioral data and user-generated content which may be available for analysis and have associated metrics that offer excellent measurement and analysis opportunities for managers. A sheer number of digital and social media tools are available on the net, most of which free of charge, to count the number of brand or product mentions, track conversations around a brand or topic, measure the reach or frequency of a post (number of people exposed to a message), the site stickiness (the ability of a site to draw repeated visits and keep people on the site)[46], etc..

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an improvement in customer satisfaction". Those are recognized as being the Big Three Goals in business, all that matters for an organization in the long run.

[45] To this regard, Hoffman and Fodor (2010) proposed the Strategic Options for Social Media Measurement matrix that summarizes the choices managers face as they strive to develop social media strategy and suggests better (and worse) paths toward social media success. It explains that social media managers or marketers may approach measurement along a continuum of fuzzy to quantifiable and may see effectiveness along a continuum of failing to succeeding. The result of a simple matrix indicating that social media marketers may see social media as a dead end (fuzzy measures, ineffective), in need of measurement and adjustment (quantified measures, ineffective strategies), a naïve optimist (fuzzy measures, effective strategies), or as an iterative process (quantified measures, effective strategies).

[46] According to Tuten and Solomon (2013) some of the activities that may be measured are the followings:

Reach: The number of people exposed to a message.

Frequency: The average number of times someone is exposed to a message.

Site Stickiness: The ability of a site to draw repeated visits and keep people on the site.

Relative pull: a comparison of how well different creative executions generate a response of creative advertising.

Clickthroughs: The number of people exposed to an online ad or link who actually click on it.

Sales Conversions: The number of people who click through who go on to purchase a product.

Viewthroughs: The number of people who are exposed and do not click through, but who later visit the brand's website.

The difficulty, in such an overwhelming abundance may be to find the proper approach to measurement[47], the best process[48] or metrics framework to fit the company's needs. In fact, due to the huge variety of social media and measurement tools, still emerging new, and on the counterpart the specific needs of the hospitality companies, there is no silver-bullet kind of metric or metric compilation that addresses all requirements for all alike (Sterne, 2010). Only, the shared fundamentals of social media may offer common threads that allow at least a unified approach to the construction of appropriate measurement frameworks. Many scholars or social media praticitioners have proposed different theoretical frameworks for social media measurement (Tuten and Solomon, 2013; Murdough, 2009; Etlinger, 2011; Lovett and Owayang, 2010; among others) as well as metrics categorizations[49] to guide managers.

As a framework for our third research question, once again, we chose Tuten and Solomon's theories. They offer a categorization of metrics by type:

Activity Metrics (input focused), measure the input the brand is making into

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[47] According to Tuten and Solomon (2013) there are different ways to track social media results:

Forward tracking requires the analyst to develop traking mechanisms prior to launching the activity or campain. Forward tracking is the most accurate approach because it enables the account team to develop a mechanism to track exactly the data desired.

Coincident tracking begins during the activity or campaign. This method relies on data we gather at the point of interaction or point of sale.

Reverse tracking is conducted after an activity or campaign has concluded. This approach also uses residual data and may include primary data collection such as surveys to assess the effects of the campaign.

[48] Tuten and Solomon (2013), suggested a four-step process to organize a measurement plan, known as DATA approach:

Define: Define the results that the program is designed to promote.

Assess: Assess the costs of the program and the potential value of the results

Track: Track the actual results and link those results to the program.

Adjust: Adjust the program based on results to optimize future outcomes.

This process allows to clearly specify what the program should accomplish for the organization and then confirm that the plan works.

[49] Other categorizations are offered by social media pratitioners like Hootsuite: available at< https://hootsuite.com/resources/white-paper/Turning-Insight-Into-Action-The-Journey-to-Social-Media-Intelligence> < https://blog.hootsuite.com/social-media-metrics> [Accessed on 13.05.2016 and 19.02.2018], Sproutsocial Available at: <https://sproutsocial.com/insights/social-media-kpis> [Accessed on 19.02.2018] and many others.

developing a digital/social presence, in other words, the actions the company takes relative to Social Media. For instance, an organization might set goals in terms of the number and timing of blog posts, tweets, videos, comment responses and status updates it may contribute in social venues. Examples of some of the most commonly used digital and social media marketing metrics for this type are the number, frequency and recency of posts, tweets, video shared, tags, activity in number of media, etc.;

Interaction Metrics (process focused), focus on the customer engagement with the brand's digital and social persence, i.e. with the Social Media platforms and reviews. According to the Interactive Advertising Bureau (IAB, 2009), engagement measurement is the most critical assessment component for digital and social campaigns. Interaction measures include the number of links and backlinks, followers and fans, comments, likes, recommendations and reviews and the amount of shared content. Interactions are essentially composed of all the ways in which users can participate in a social media relationship with the brand. These measures may also be specific to the form of social media being used by the brand and the type of participation warranted.

Return Metrics (oucome focused), measure the outcomes (financial or otherwise) that directly or indirectly support the success of the company. They include return on investment (ROI) measures, cost reduction measures, and other performance metrics which are particularly relevant for digital and social media praticioners including return on impressions, return on digital impact, and return on earned media. These data sources are only valuable for managers who understand their relevance, availability and use.

While all the social media tools have their own distinct features and selling points, there is one constant among them regardless of which tool is used, and that is that the tools are only as good as the individual running them (Thomas, 2009). The real task lies, indeed, in making sense of the information retrieved since a human brain is needed to mine and analyze the data to determine sentiment, trends, information flow, source of opinion, etc..

That said, an immense amount of opportunities are offered to tourism managers and praticioners not to ignore and undervalue the impact of social media's contribution to business success. These may be declined in different ways according to the organizations' needs and resources, to the managers skills and expertise with or without the support and guide of a strategy.

But are tourism managers aware of the importance of measuring the impact of their activity on social media? Are they interested at all in observing that kind of impact? Do they know and/or use at least some of the measurement tools? The answers to these questions will give an idea of the consciousness of the hospitality managers and praticioners about the immense and vast potential of social media on business success.

3.1.1 Research target

In this study, the unit of analysis is hospitality businesses. The research target population includes all kind of accommodation firms (from Bed and Breakfasts to campings, going through farm houses, Hotels, mountain chalets and so on) located in the Italian central-adriatic regions. Basically, the choice of Emilia Romagna, Marche and Abruzzo as geographic areas to investigate, was suggested by the fact that we easily got the e-mail database from the regional tourist boards. The decision not to further enlarge the target population to the entire nation or to the whole centre of Italy including the Tirrenic coast regions, was taken considering the time and resources needed against our availability. Thus, the participants selected for this study where all the hospitality businesses of the Italian central-adriatic regions for a total of approximately 16,000 firms. One of the issues concerning the research target is the fact that the various accommodation types may differ from region to region (in terms of name, size, number of beds allowed, minimum requirements, classification, etc.), making data comparison difficult. In fact, the Italian Constitution (art.117) entitles Regions and autonomous Provinces with exclusive legislative powers in the field of Tourism. Therefore, according to the basic principle of subsidiarity, each one of the 20 Italian Regions has its own laws and regulations on Tourism. For example, the number of bedrooms to be let in Bed and Breakfasts establishments may vary, whereas Farm House may be named in different ways (Country House, Land Farm, Rural property, etc.) and so on. So, firstly I compared the regulations of the three Regions involved to discover that they are similar enough to allow for generalization and data comparison. Secondly I decided to take the Region Marche's accommodation options (in terms of names) as a reference point since all of the lodging types were provided. Some adjustment among similar accommodation types was still needed. For example, although there are different types of rest areas or shelters in the three regions, we have grouped them under the more general terms "rest area" and "shelter".

Data were obtained using CAWI (Computer-assisted web interviewing) surveying technique through Google Forms platform. Invitations to participate to the online questionnaire have been sent via e-mail through a dedicated server released by the University of Urbino in order to reduce spamming. Initially a pre-test was applied to a pair of businesses for each accommodation type of the region Marche, to identify possible problems with the readability and feasibility of the questionnaire. As a result of comments from the pilot tests, minor adjustments to the questionnaire were made.

Since most of the businesses are seasonal, invitations have been sent in two different periods: the first one at the beginning of the seasonal opening around May/June 2016 and the second e-mail invitation at the end of the season on September of the same year. Data collection required two different e-mail invitations and a few reminder emails to non-respondents. Statistical analysis was performed with SPSS Version 21.0 and R version 1.1.447 statistic software packages.

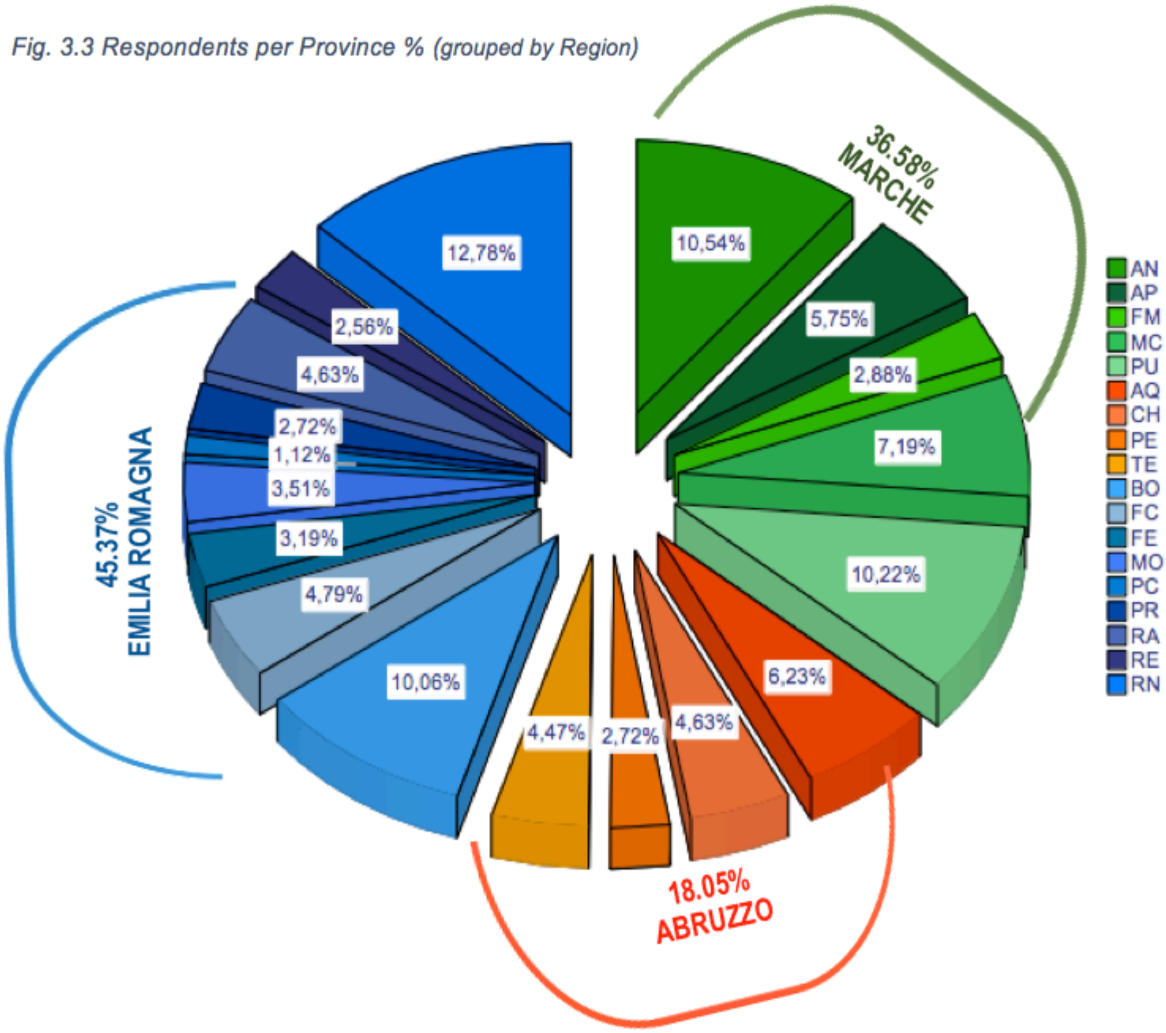
3.2 Findings

A consistent part of the 16.000 e-mail addresses sent turned out to be invalid or no longer existing or even belonging to persons who resulted to have ceased their activity as accommodation practicioners. Another big part of the e-mails sent were repeatedly spammed. Thus, approximately 15.000 e-mail invitations to participate to the online survey may have successfully reached the hospitality managers of Marche, Abruzzo and Emilia Romagna (reached population). Considering that the response rate for web surveys is estimated to be lower than other survey modes (at least 11% lower according to Yan & Fan, 2010) and considering the very large sample size involved in the study, the response rate was satisfying. In total, we got 626 responses which is approximately the 4.2% of the sample. Completion rate is 100%, but considering the fact that if the respondents do not use social media, they are forwarded to the conclusion, and indeed 42 respondents abandoned the survey after answering "no" to the question, the total completion rate is 93%.

The respondents were nearly all owners or managers of the accommodation establishment (87%), The response rate of the total target population is in line with the average return rate collected from the single regions involved: we got 3% response rate from Emilia Romagna and 5% from both Marche and Abruzzo. Emilia Romagna though, is the region from which we got the highest number of respondents to the online survey, counting 284 answers (45.37%) out of the population of 9359 establishments to which an e-mail invitation was sent.

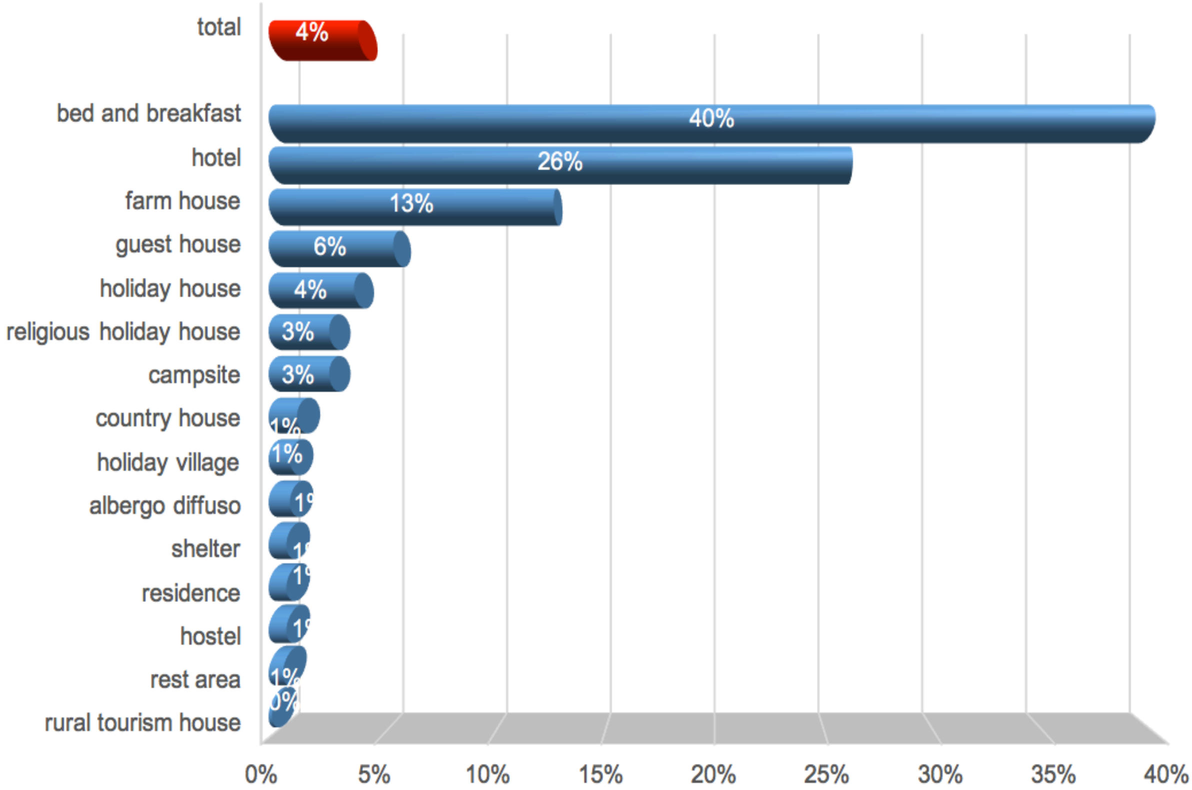
Analyzing the respondents per Province, surveys were mostly answered by hospitality practicioners from Rimini and Bologna for the Region Emilia Romagna and by those located in the Provinces of Ancona and Pesaro-Urbino in the Marche Region (Fig.3.3).

Fig. 3.3 Respondents per Province % (grouped by Region)



The type of accommodation business from which we received the most responses, in the three Regions as a whole, is Bed and Breakfast (from now on also B&B). We collected 249 online questionnaire responses from B&Bs which correspond to 40% of the total number of surveys collected (Fig. 3.3), against 26% received from Hotels and 13% from farm houses (out of the total amount).

Fig. 3.3 Rate (%) of respondents per accommodation type on total respondents (4%=100%)



Coherently, Bed and Breakfasts are the top respondents for the regions Marche and Abruzzo where that kind of business covers the 35% of all the hospitality firms (Fig. 3.4). This may be easily explained by the fact that Bed and Breakfasts are the largest group of accommodation types in the two regions above. There are nearly two B&Bs per Hotel in the Region Marche (1684 vs 851) and approximately a ratio 1:1 in the Region Abruzzo (745 bed&breakfasts vs 724 Hotels).

However, in the Region Emilia Romagna, where Bed and Breakfasts are much less than Hotels (2048 vs 4164) in a ratio 1:2 (Fig. 3.4), the majority of survey responses came from Hotels (111 answers out of the 284 total responses) closely followed by B&Bs (101 answers) (Fig. 3.5).

Fig. 3.4 Number of existing accommodation establishments as at 2016 per Region[50]

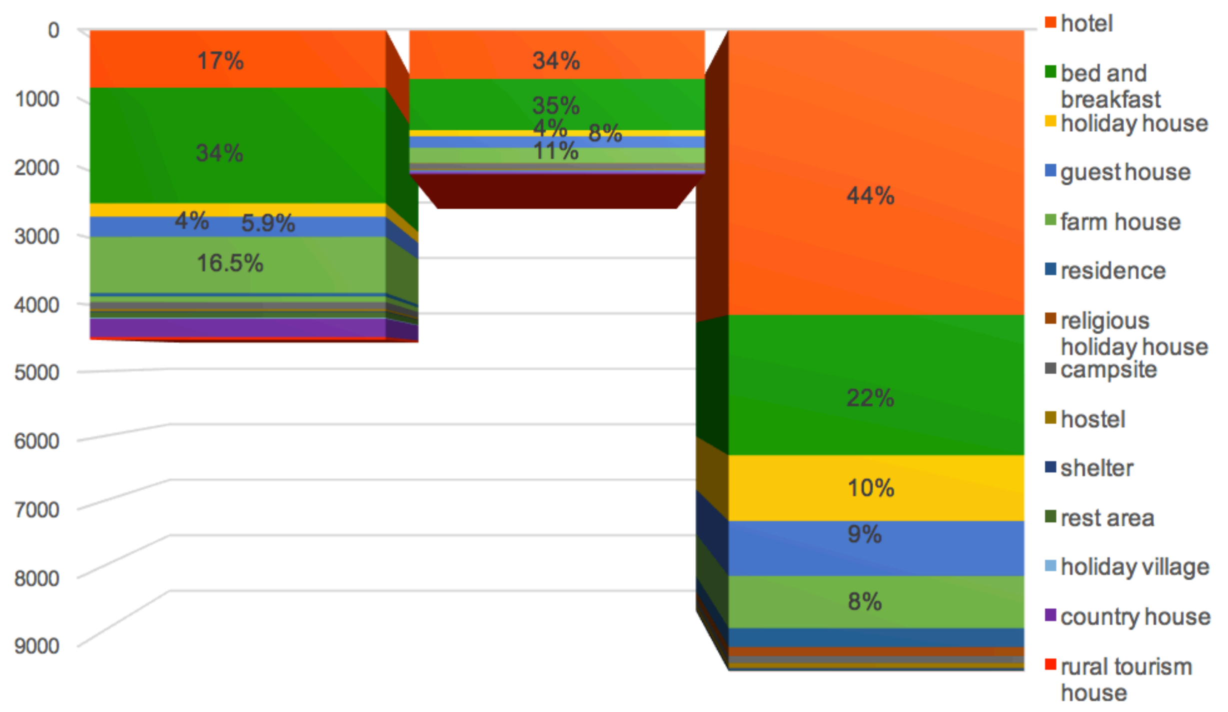
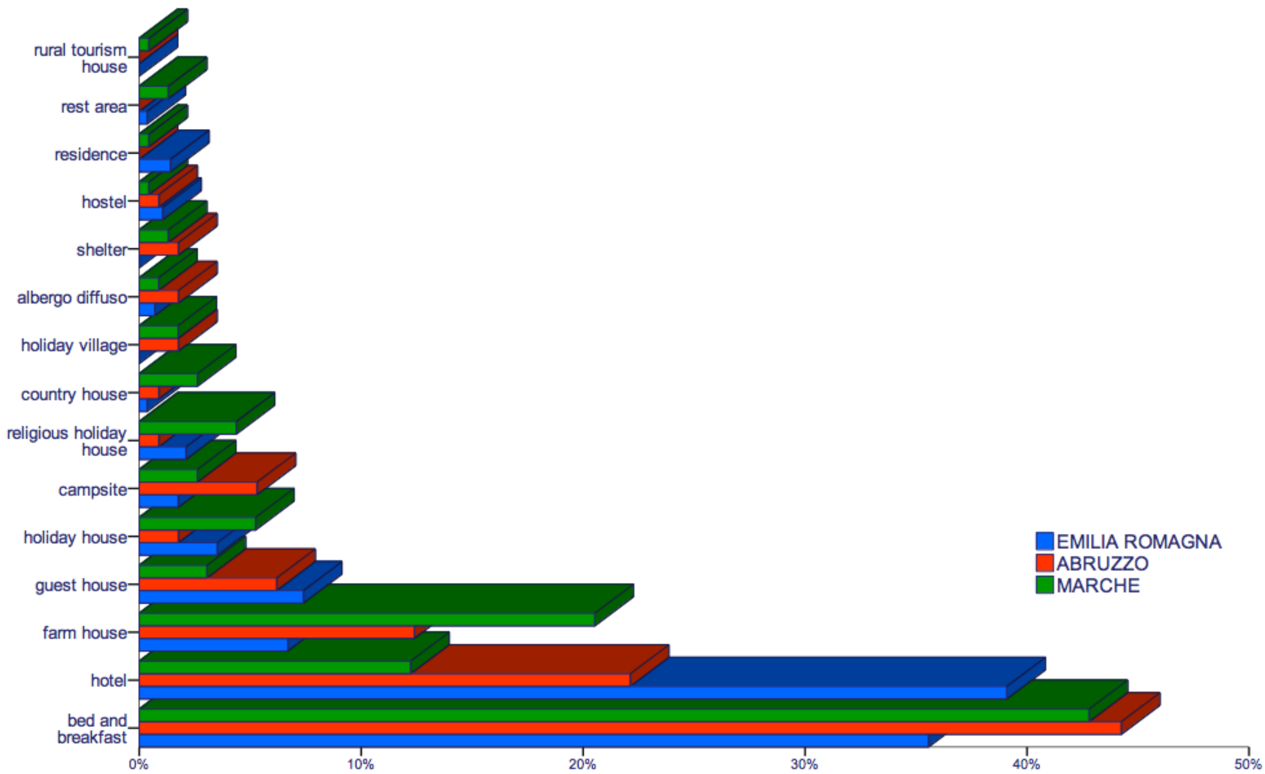


Fig. 3.5 Rate of respondents per type of accommodation in each Region



[50] The rate% is calculated on the total amount of accommodation establishments per each region

Anyway the number of responses from B&Bs only covers a 6% of the total establishments of the same type which have been reached by the e-mail invitation to participate to the research in the three regions. Hotel respondents cover a 3% response rate on the total amount of Hotels reached and Farm Houses respondents a 4%. The respondents are mainly micro-enterprises[51]: 87.9% of them employ less than 9 people (criterion i – cfr note 10) and 65.2% earn less than 2,000,000 € (criterion ii) out of which 86% have less than 9 workers. A bulk 97% of the respondents meets either one of the two specified qualifying criteria, namely sales turnover ≤ 2 million € or < 9 full-time employees, being as such deemed as a micro-enterprise (Table 3.1).

*Table 3.1 Enterprise size classification based on staff headcount * Turnover*[52]

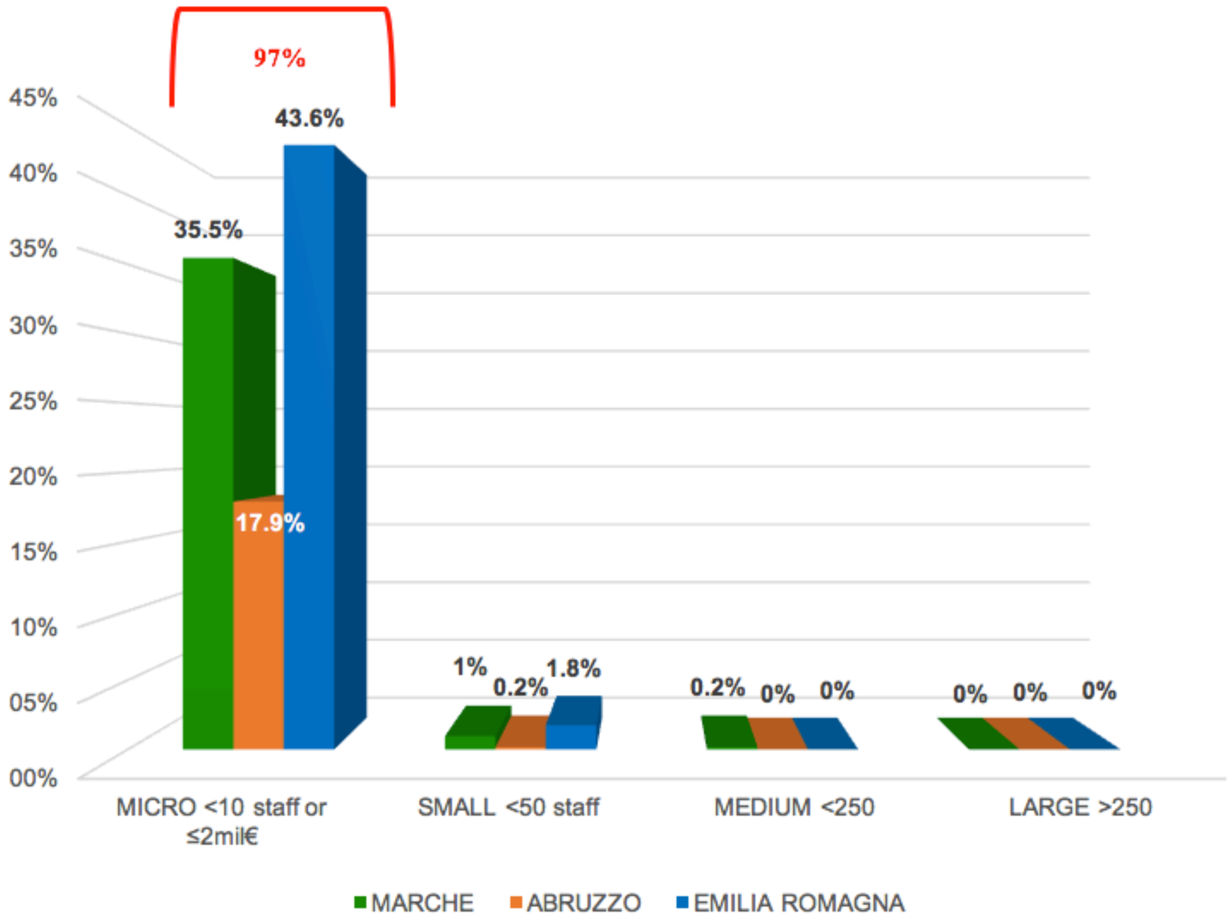
Staff headcount	Turnover								Total	
	>=0 <=2,000,000€		>2,000,000€ <=10,000,000€		>10,000,000€ <=50,000,000€		>50,000,000€			
	count	rate %	count	rate %	count	rate %	count	rate %	count	rate %
<10 staff	351	60	108	18.5	50	8.5	9	1.5	518	88.5
<50 staff	56	9.6	5	0.9	1	0.2	4	0.7	66	11.3
<250 staff	1	0.2	0	0	0	0	0	0	1	0.2
Total	408	69.7	113	19.3	51	8.7	13	2.2	585	100
	micro-enterprises		**small enterprises**		**medium-large enterprises**					

Except for the 97% micro-enterprises, there only are very few small-sized establishments among the respondents (mainly located in Emilia Romagna) and just one (0,17%) medium-sized business located in the region Marche (Table 3.7).

[51] According to the EU recommendation 2003/361 a micro-enterprise is generally defined as a small business employing nine people or fewer (i), and having a balance sheet or turnover less than 2 million Euros (ii). A business will be deemed as an SME if it meets either one of the two specified qualifying criteria, namely sales turnover or full-time employees, whichever is lower. Available at: <http://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_it> [accessed: 3 April, 2018]

[52] The crosstable only takes into account the complete answers to both survey questions (turnover and staff headcount). Since the question about the turnover is a non-compulsory one, 41 respondents (6.5% out of the 626 respondents) did not answer, getting to a total of 585. Thus, 41 answers to the survey question about the staff headcount are not reckoned in the crosstable because crossed with empty cells. The additional data about the staffheadcount are the followings: 1 <250; 8 <50; 32 <10.

Fig. 3.6 Respondents per size class of enterprise in each Region



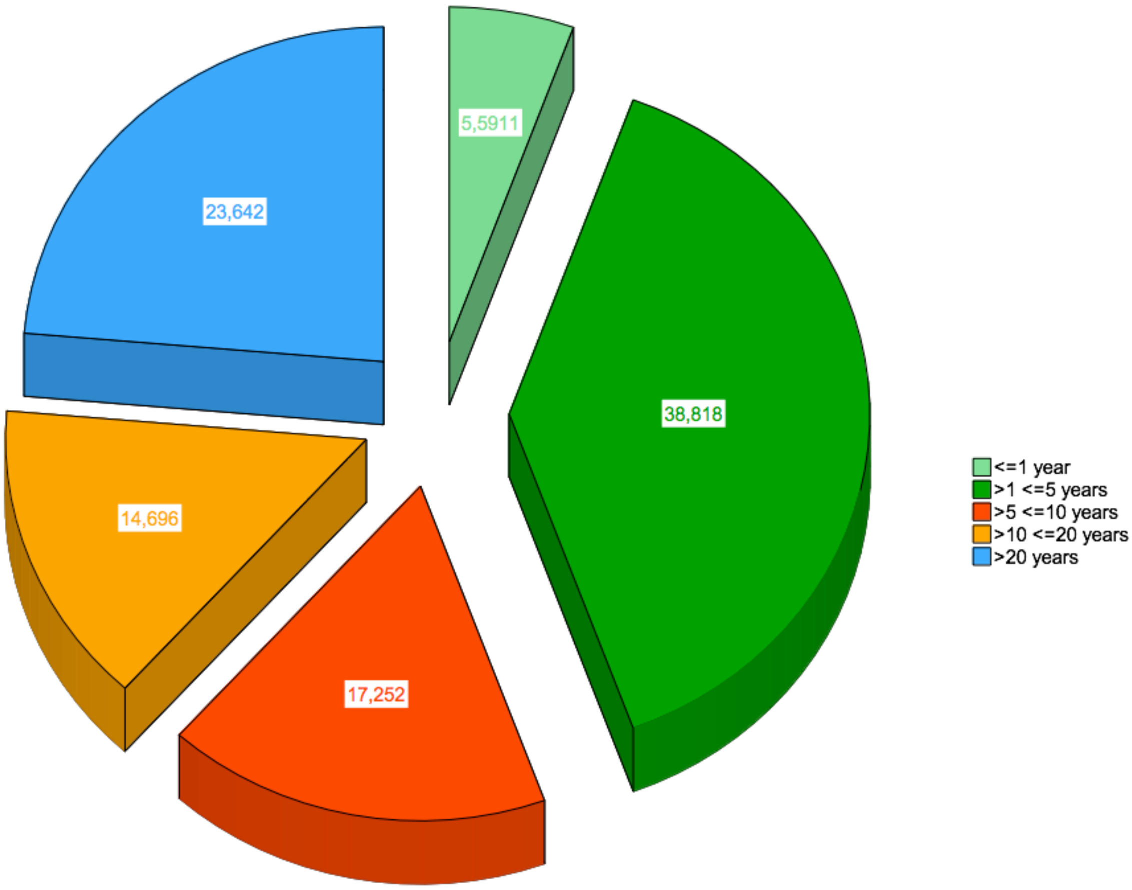
Considering the 36.4% of the respondents employing no worker at all, the majority of those are Bed and Breakfasts (67%) followed by farm houses (10%) and holiday houses (7.9%), but there are even 8 small Hotels. Out of the businesses with less than 9 workers, the majority are bed and breakfsts (45.3%), Hotels (18.5%) and farm houses (14.4%) but in this case all of the accommodation types are represented. Even if we consider that a 4.5% of the respondents employing up to 9 people did not answer to the question about the turnover/balance sheet total (the question was a non compulsory one), still, only a 64% of those, earn less than 2 million Euro. While a 11% even earns more than 10 million Euro. What is more difficult to understand is that 12.3% of the enterprises with no full-time employees earn from 10 to 50 million euros and are to be classified as micro enterprise.

Similarly out of the 13 establishments having a turnover/balace sheet higher than 50 million €, a 69% employ less than 9 people and is as well to be classified as micro-enterprise.

Only a very small part of the respondents (12.1%) manages more than one tourist accommodation establishment (only 1.3% manages more than 4 establishments) or belongs to a group (7.5%) or to a chain (9.9%) of accommodation businesses.

As far as the demography of the respondents is concerned, we asked about the length of time in hospitality business. This was intended to help us understand whether the hospitality entrepreneurs have a long experience in the tourism industry and if they have gone through and survived to the past crisis. A good 38.3% of the firms has been working in the tourism and hospitality industry for more than 10 years (Fig. 3.7). But the majority of the accommodation firms are quite young. In fact the 44.4% of them have a length of time in business of less than 5 years. The modal value for the length of time in business is 1-5 years.

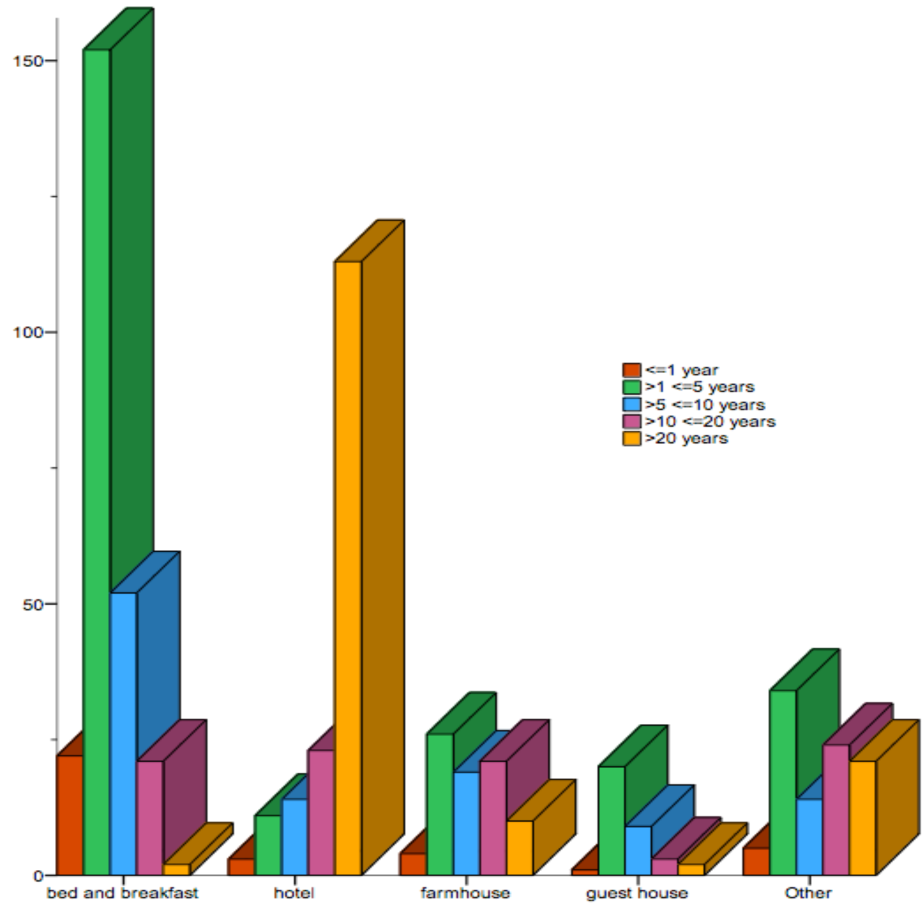
Fig. 3.7 Tourism and hospitality enterprises length of time in business



This is easier to understand if we cross the accommodation types with the length of time in business (Fig. 3.8; Table 3.2). In general, Bed and Breakfasts are the establishments with the lowest length of time in business and this may be explained by the fact that this kind of enterprise has considerably spread in Italy only in recent years[53].

In fact, the first law governing the sector dates back to 1999 in Emilia Romagna[54], but the national Reform of Tourism law 135 of 29 March 2001 is the first regulation that applies allover Italy. Also, B&Bs are small establishments often led in private family homes as a supplementary source of income (because of the limited number of bedrooms) and in general a type of accommodation not to be considered as 'serviced' business activity[55], therefore much easier to start, manage and cease.

*Fig. 3.8 Enterprise length of business * accommodation type*



[53] The number of Bed and Breakfasts in Italy increased from 21,852 in 2010 to 32,367 in 2016. Available at: <https://www.statista.com/statistics/795713/number-of-bed-and-breakfasts-in-italy/> [accessed 4 march 2018]

[54] Each Italian region has different regulations regarding the numbers of bedrooms to be let, the size of the rooms, minimum furnishing requirements in all letting bedrooms and so on.

[55] This means that the owners do not need to charge VAT to the guests and that the income they generate will only be subject to the income tax at the highest marginal rate and only need to be declared once a year on the owners' personal tax return.

*Table 3.2 Enterprise length of business * accommodation type*

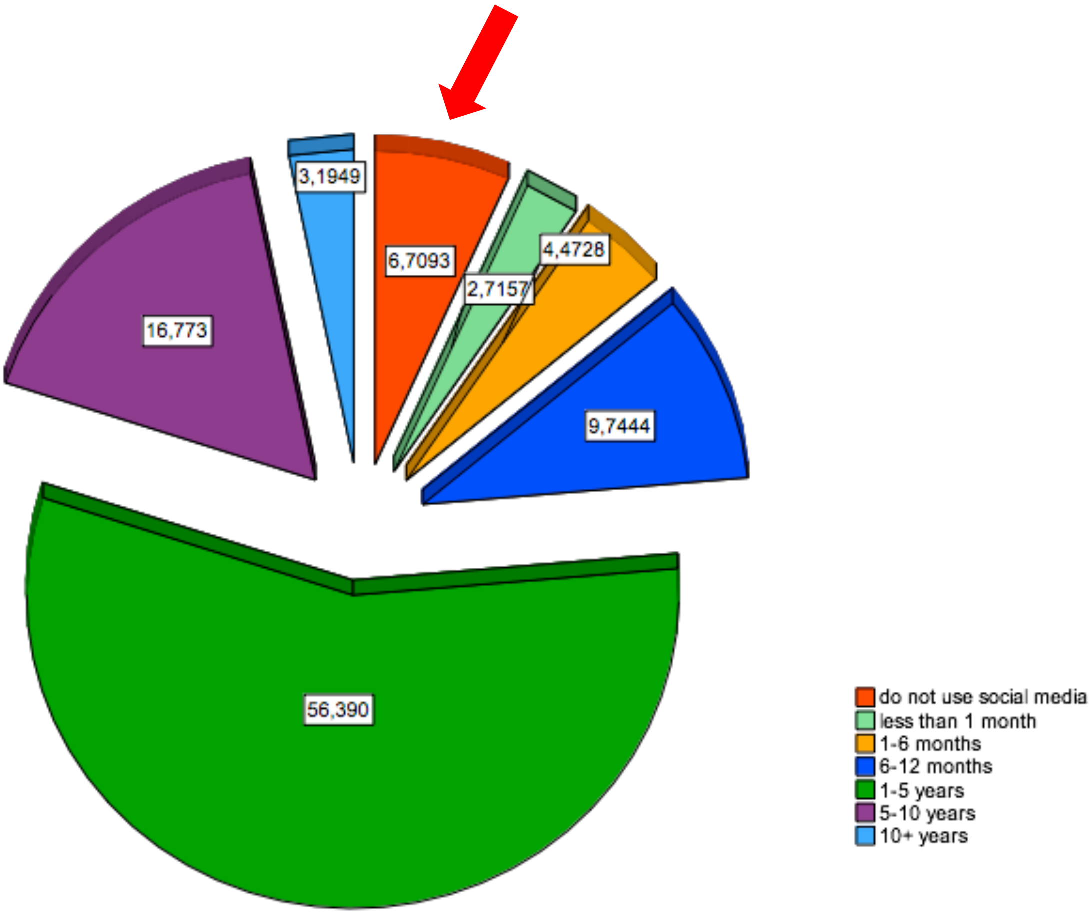
Accommodation type	Lenght of time in business					
	<=1 year	>1 <=5 years	>5 <=10 years	>10 <=20 years	>20 years	total
Hotel	3	11	14	23	113	164
albergo diffuso	1	2	0	3	0	6
guest house	1	20	9	3	2	35
farmhouse	4	26	19	21	10	80
rest area	1	1	0	2	0	4
Bed and Breakfast	22	152	52	21	2	249
campsite	0	2	1	6	8	17
religious holiday house	2	11	3	1	0	17
country house	0	1	4	3	0	8
hostel	0	2	0	3	0	5
residence	0	2	1	2	0	5
rural tourism house	0	0	0	1	0	1
holiday village	0	0	0	0	6	6
shelter	0	3	0	1	1	5
holiday house	1	10	5	2	6	24
Total	35	243	108	92	148	626

Having exhaustively depicted the respondents' characteristics, we will now proceed answering the three research questions.

1. To what extent are hospitality managers using social media?

We will try to go deeper into the social media use and familiarity of the accommodation entrepreneurs and practicioners, elaborating data collected with the second section of the questionnaire. As said, 42 respondents out of 626, corresponding to the 6.7%, answered that they do not use social media at all to promote their business (Fig. 3.9) and thus, were forwarded to the conclusion of the survey. Therefore, for the elaboration of data stemming from question 12 onward, we will only consider the 584 respondents that completed the questionnaire. The respondents answering that they are not using social media to promote their business come mainly from region Emilia Romagna (Table 3.3), where they are 7.7% of the total accommodation facilities taking part to the research for that region. In second place we find the respondents from Abruzzo (6.2% out of the total) and then, those from the Region Marche (5.7%).

Fig. 3.9 How long have you been using social media?



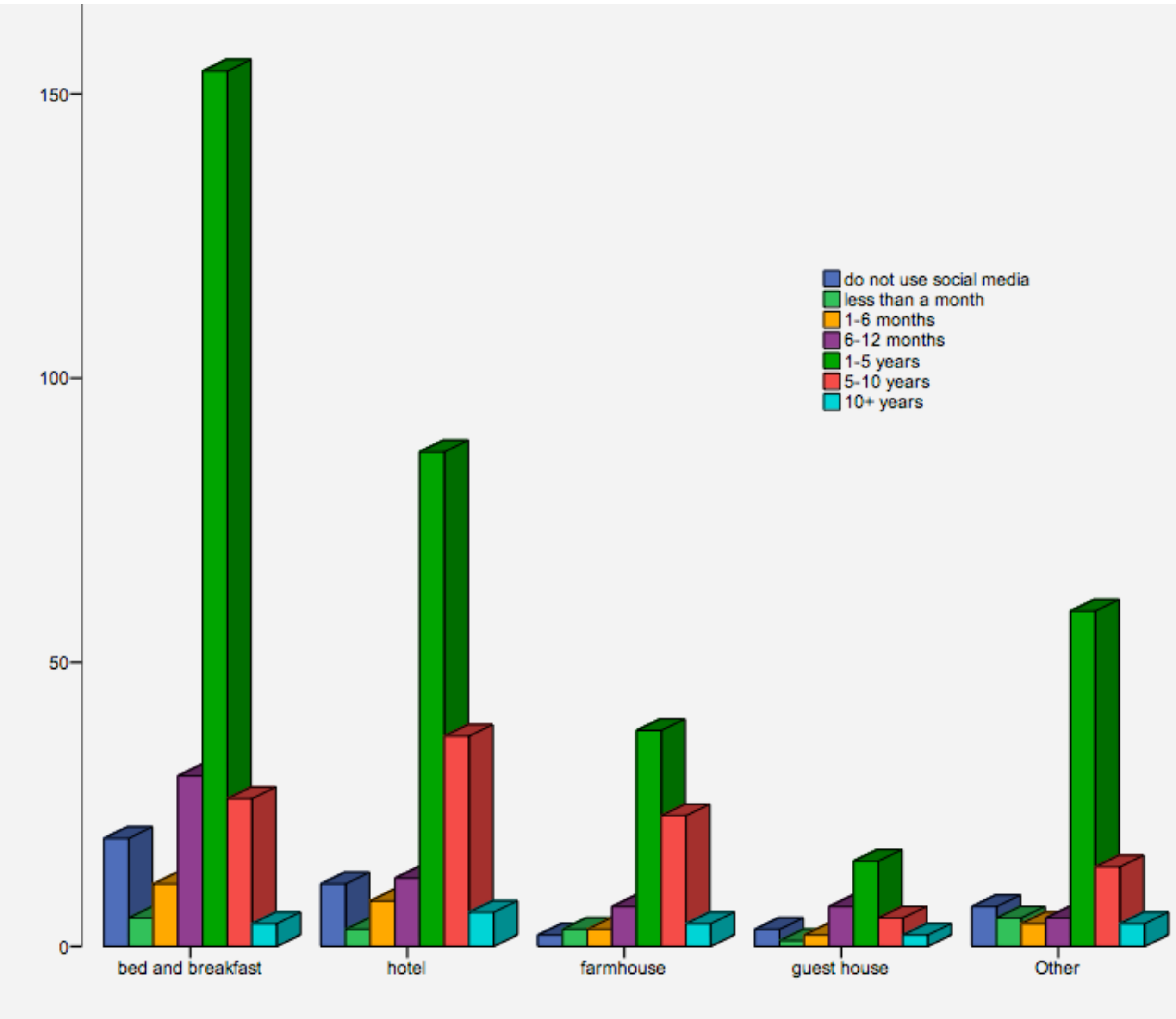
As far as the accommodation type is concerned, the non-users are mainly bed and breakfasts followed by Hotels (Fig. 3.10). Mainly, the non-users have a 1 to 5 years length of time in business but this is in line with the total respondents' experience in the hospitality industry. The majority of the respondents using social media to promote their business (93%) has been using them for 1 to 5 years (Fig. 3.10; Table 3.3), which is a quite recent time considering how fast and wide social media have spread among the tourists in the last decade. In addition, a 16.9% of the respondents have been using the web for less than one year.

*Table 3.3 Experience of use of social media*Lenght of time in hospitality business*REGION*

REGION				How long have you been using social media?							Total
				do not use social media	less than a month	1-6 months	6-12 months	1-5 years	5-10 years	10+ years	
ABRUZZO	lenght of time in hospitality business	<=1 year	rate %on total	0,0%	0,0%	0,0%	2,7%	0,9%	0,0%	0,0%	3,5%
		>1 <=5ys		4,4%	0,0%	5,3%	3,5%	20,4%	0,9%	0,0%	34,5%
		>5 <=10ys		0,9%	0,0%	0,9%	1,8%	8,0%	7,1%	0,0%	18,6%
		>10 <=20ys		0,9%	0,0%	0,9%	1,8%	8,8%	4,4%	2,7%	19,5%
		>20 years		0,0%	0,0%	1,8%	1,8%	10,6%	8,0%	1,8%	23,9%
	Total			6,2%	0,0%	8,8%	11,5%	48,7%	20,4%	4,4%	100%
EMILIA ROMAGNA	lenght of time in hospitality business	<=1 year	rate %on total	0,0%	0,4%	0,0%	1,4%	0,7%	0,0%	0,0%	2,5%
		>1 <=5ys		2,8%	1,4%	1,4%	3,2%	28,5%	0,4%	0,4%	38,0%
		>5 <=10ys		2,5%	0,0%	0,4%	0,4%	7,0%	4,9%	0,0%	15,1%
		>10 <=20ys		0,7%	0,7%	0,7%	2,8%	7,7%	2,5%	0,4%	15,5%
		>20 years		1,8%	0,7%	1,8%	1,1%	14,8%	7,4%	1,4%	28,9%
	Total			7,7%	3,2%	4,2%	8,8%	58,8%	15,1%	2,1%	100%
MARCHE	lenght of time in hospitality business	<=1 year	rate %on total	1,3%	2,6%	1,3%	4,4%	0,9%	0,0%	0,0%	10,5%
		>1 <=5ys		1,3%	0,4%	1,3%	4,4%	33,6%	0,9%	0,0%	41,9%
		>5 <=10ys		1,3%	0,4%	0,0%	0,4%	7,4%	8,7%	0,9%	19,2%
		>10 <=20ys		0,4%	0,0%	0,0%	0,0%	4,4%	4,8%	1,7%	11,4%
		>20 years		1,3%	0,0%	0,0%	0,9%	10,9%	2,6%	1,3%	17,0%
	Total			5,7%	3,5%	2,6%	10,0%	57,2%	17,0%	3,9%	100%
TOTAL	lenght of time in hospitality business	<=1 year	rate %on total	0,5%	1,1%	0,5%	2,7%	0,8%	0,0%	0,0%	5,6%
		>1 <=5ys		2,6%	0,8%	2,1%	3,7%	28,9%	0,6%	0,2%	38,8%
		>5 <=10ys		1,8%	0,2%	0,3%	0,6%	7,3%	6,7%	0,3%	17,3%
		>10 <=20ys		0,6%	0,3%	0,5%	1,6%	6,7%	3,7%	1,3%	14,7%
		>20 years		1,3%	0,3%	1,1%	1,1%	12,6%	5,8%	1,4%	23,6%
	Total			6,7%	2,7%	4,5%	9,7%	56,4%	16,8%	3,2%	100%

This also means that the accommodation enterpreneurs/mangers have a very recent experience with social media which may reveal a low familiarity. The youngest respondents in using social media come from Abruzzo, where a 8.8% out of the total accommodation enterprises taking part to the research have been using social media for less than 6 months and a 20.3% for less than one year. Considering the whole population of hospitality owners/managers answering to the survey, Emilia Romagna is the region from which come the most respondents with less experience in using social media. The respondents from the region Marche are, on the contrary, those that have the most experience in using social media to promote their business (9 respondents out of the total have been using social media for more than 10 years vs 6 of Emilia Romagna and 5 from Abruzzo). The respondents with more experience in using social media (namely 5-10 years and 10+ years) are mainly Hotel owners/managers followed by Bed and Breakfasts and farm houses managers. Those with less experience (up to one year) are Bed and Breakfasts. In general, the modal value of the length of use of social media is 1-5 years.

Fig. 3.10 How long have you been using social media by accommodation type[56]

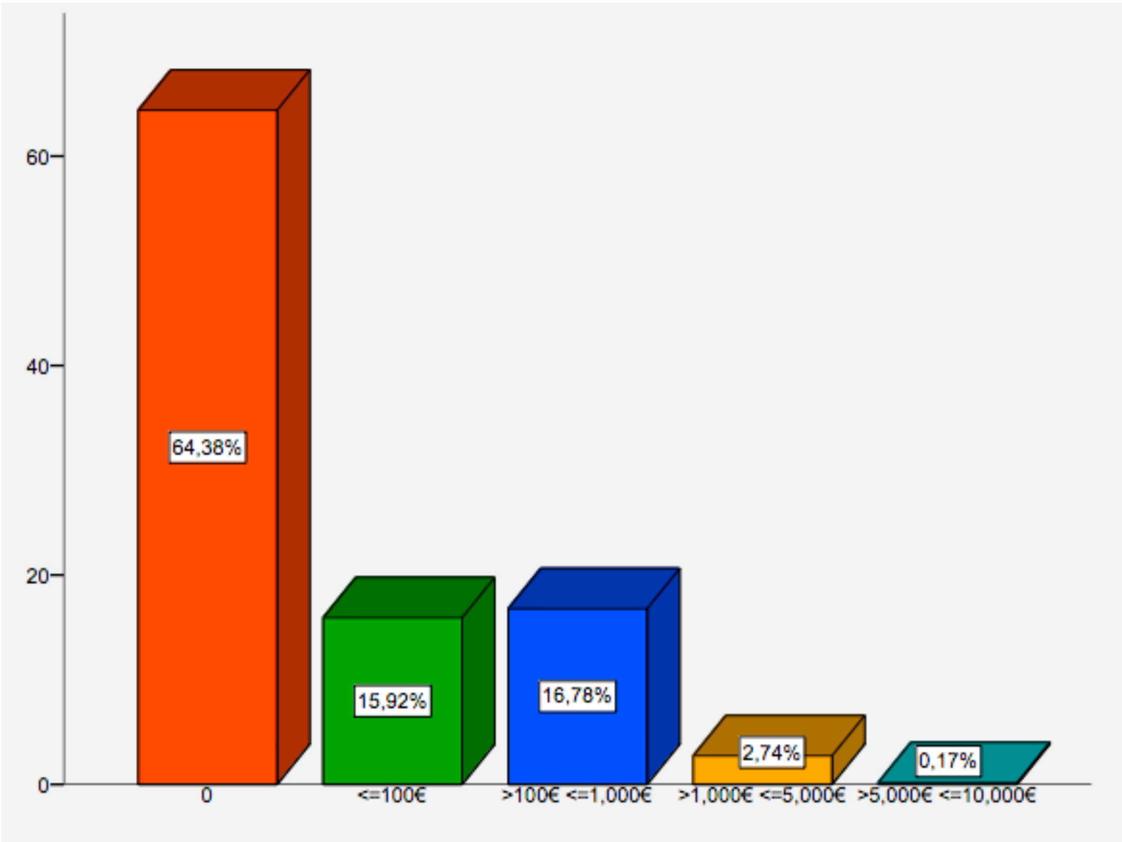


Social media are mainly managed by the accommodation establishment's owner (72%) and more seldom tasked to an agency (8%) or to external social media professionals (3,7%). Anyway, the respondents invest very little in social media training courses thus, in acquiring digital skills (Fig. 3.11). This, we may undoubtedly say, reveals a lack of awareness about the importance of social media activities and their impact on the hospitality business. The great majority of the respondents (64.4%) do invest no money at all in courses to improve their knowledge of ICTs and only one Hotel, located in Emilia Romagna, invests more than 5,000€ yearly. The very few (2,9% out of the total) accommodation facilities investing more (> 1,000€ to 10,000€/y) are Hotels (41%, namely 7 facilities out of 17 investing more than 1,000€) B&Bs (17.6%) and Farm Houses (11.8%) located in the regions

[56] Categories with less than 5% have been collapsed in Other

Emilia Romagna and Marche (respectively 8 and 7 facilities out of 17). The 53% of those investing higher amounts (1,000€+ yearly) have a bigger capacity (101+ beds) while the accommodation establishments with less than 12 beds just cover a 11.8% of respondents investing more. The 47% of the “top investors” in social media training have a longer experience in hospitality business (20+ years), but have been using social media only for 1-5 years (namely the 53%, while another 29% has a 5-10 years experience in using SM).

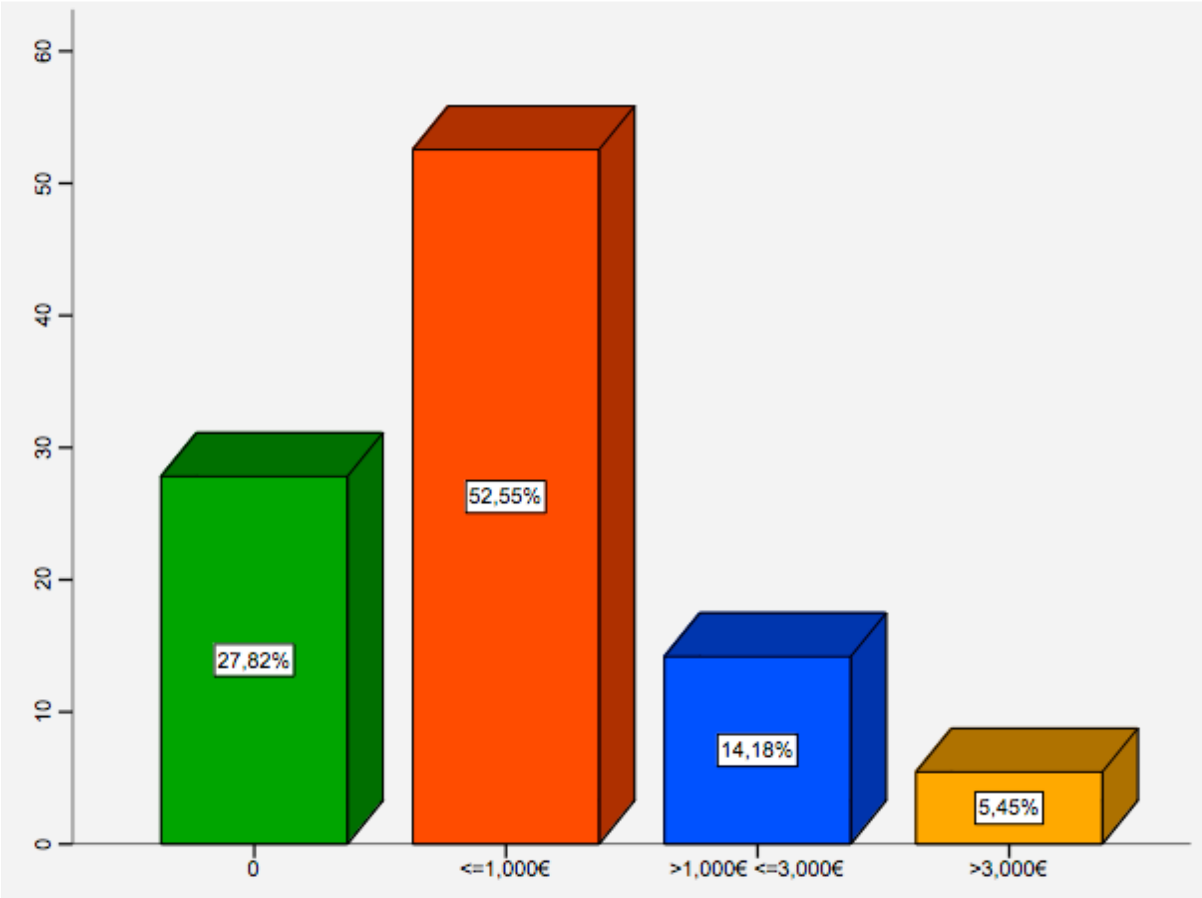
Fig. 3.11 Yearly investment in social media training



The 45% of those investing zero euros have a length of time in business of >1 <=5 years and mainly a 1-5 years experience in using social media (62% out of the 376 facilities investing zero euros in social media training). But, still, an 18% of them have been using social media quite longer (5+ years). Even if it may be argued that the non-investment in training courses could be explained by the fact that owners/managers already have the necessary skills to manage social media activities, the very rapid evolution of ICT’s may not justify, though, the non investing in refresher courses. Besides, 27.8% of the respondents do invest absolutely nothing in a year to promote their business on social media (Fig. 3.12).

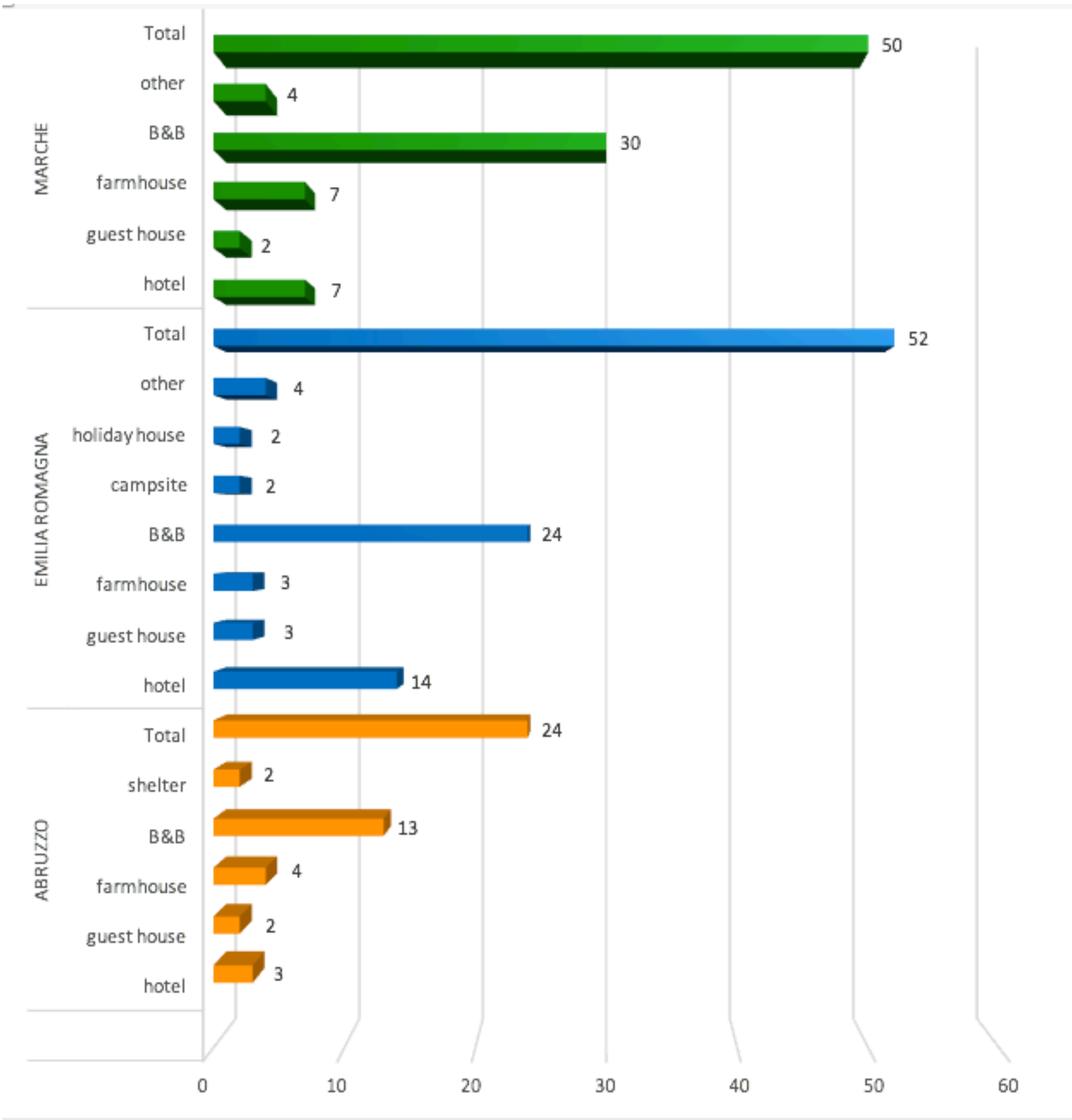
The majority of them (52.5%) invest less than 1,000€ a year. This result undoubtedly reveals there is no awareness of the opportunities offered and of the potentiality of ICTs.

Fig. 3.12 Yearly investment in business promotion on social media



Among those investing no money in social media training or refresher courses a big part (36%, i.e. 126/345%) do neither invest in business promotion on social media (Table 3.4). The 126 facilities investing absolutely no money in social media promotion nor training courses (which corresponds to the 22.9% out of the total sample of 550 respondents) are mainly Bed and Breakfasts (53%), Hotels (19%) and farm houses (11%) which are mainly located in Emilia Romagna and Marche (Fig. 3.13).

Fig. 3.13 'Zero investors' distribution per region and accommodation type[57]



They mainly (42%) have >1 <=5 years length of time in hospitality business and have been using social media for a period between 1 and 5 years[58]. But what really astonishes is the fact that among the 'zero investors' a good 25% has been using social media for more than 5 years (5% of which have 10+ years experience in using ITCs) and a 32% of those

[57] The observations with value 0 have been omitted, while the observations with value 1 have been grouped in Other.

[58] As said above in this result we are excluding the respondents that are not using social media at all.

have a length of time in business of more than 10 years (of which a 17% have more than 20 years experience). Anyway the majority of the respondents investing zero euros in social media training (48%, i.e. 166/345) invest less than 1,000€ in business promotion on social media (Table 3.4).

*Table 3.4 Investment in business promotion on SM*investment in SM training*

Yearly Investment in social media training	Yearly investement in business promotion on social media						
	0	<=1,000€	>1,000€ <=3,000€	>3,000€ <=5,000€	>5,000€ <=10,000€	>10,000€	Total
0	126	166	41	9	3	0	345
	22.9%	30.2%	7.5%	1.6%	0.5%	0%	62.7%
<=100€	22	59	8	1	1	1	92
	4.0%	10.7%	1.5%	0.2%	0.2%	0.2%	16.7%
>100€ <=1,000€	5	63	20	5	2	1	96
	0.9%	11.5%	3.6%	0.9%	0.4%	0.2%	17.5%
1,000€+	0	1	9	1	2	4	17
	0%	0.2%	1.6%	0.2%	0.4%	0.7%	3.1%
Total	153	289	78	16	8	6	550
	27.8%	52.5%	14.2%	2.9%	1.5%	1.1%	100%

The very few respondents investing more than 5,000€ a year in business promotion on social media and more than 1,000€ in training or refresher courses (1% out of the total 550) are mainly (50%) tourist villages (3 out of the 6 ‘top investors’) located in Abruzzo (two of them) and Marche regions, but there also is an Hostel located in Emilia Romagna a Holiday house and a Hotel located in the region Marche. All of the ‘top investors’ have more than 101 beds and consequently 10-49 employees. They mainly have a length of time in the hospitality business of more than 20 years (50%) and have been using social media for 1 to 5 years (67% of them). Also, unlike what happens for the majority of the respondents (78% of them do not follow an investment plan), nearly all ‘top investors’ do plan their investments in social media training.

In the attempt to answer to the first research question, so far, we have been analyzing *whether* tourism practicioners do *use* social media. Now, we will try to understand *how* they use ICTs. First of all we asked about the frequency of use of social media (Fig. 3.14; Table 3.5).

Fig. 3.14 How frequently do you use social media

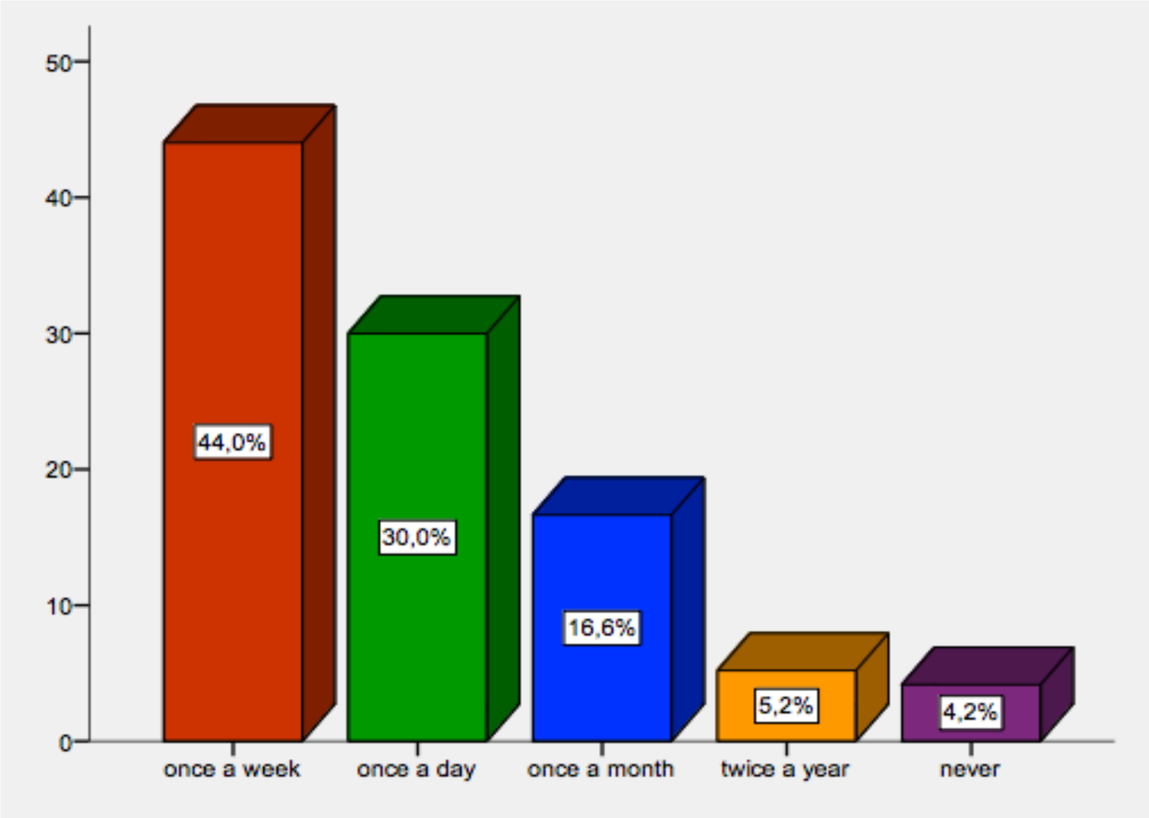


Table 3.5 How frequently do you use social media?

		Frequency	Percent	Valid %	Cumulative %
Valid	never	24	3.8	4.2	4.2
	1 a day	173	27.6	30	34.1
	1 a week	254	40.6	44	78.2
	1 a month	96	15.3	16.6	94.8
	2 a year	30	4.8	5.2	100
	Total	577	92.2	100	
Missing	999	49	7.8		
Total		626	100		

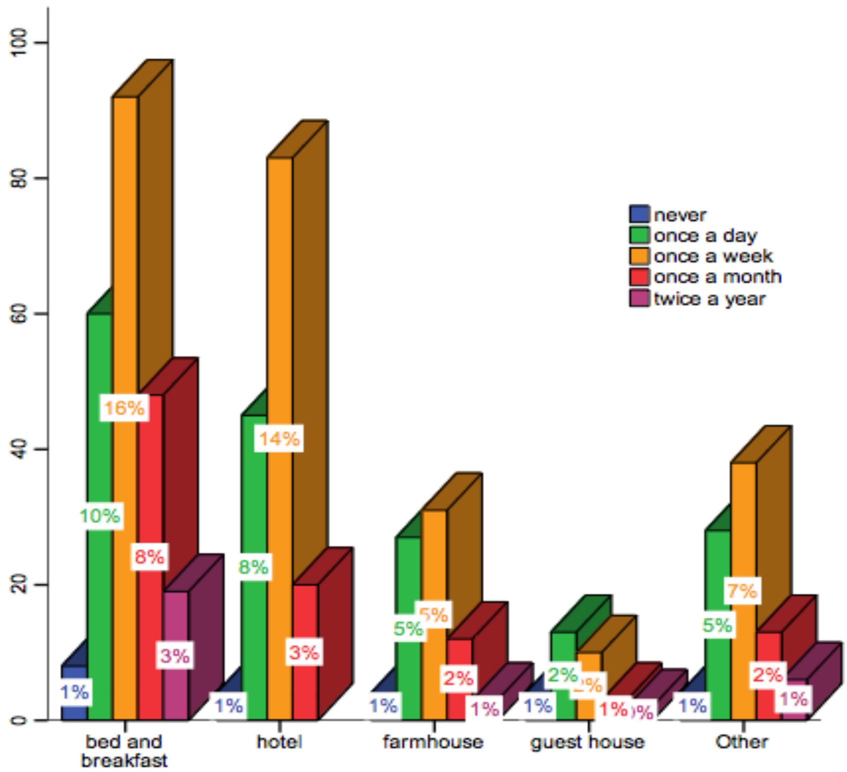
The graph in Fig. 3.14 clearly shows that the majority of the respondents do use social media only once a week or even more seldom. Only a 30% of the sample daily check their accounts on SNS or post any kind of content on the web. The latter mainly (54.3% out of the 173 enterprises using socials once a day) have been using social media for a period of time which goes from 1 to 5 years (Table 3.6) or longer (a 32% has a 5+ years experience in using ICTs). But also those using socials once a week mostly have 1-5 years experience.

Table 3.6 How long have you been using social media? How often do you use social media?*

How often do you use social media?	How long have you been using social media?							
	do not use sm	less than a month	1-6 months	6-12 months	1-5 years	5-10 years	10+ years	Total
never	49	2	3	4	11	4	0	73 11.7%
once a day	0	5	7	12	94	47	8	173 27.7%
once a week	0	3	15	29	161	39	7	254 40.57%
once a month	0	5	3	8	68	11	1	96 15.3%
twice a year	0	1	0	7	17	2	3	30 4.8%
Total	49 7.8%	16 2.55%	28 4.5%	60 9.6%	351 56.1%	103 16.45%	19 3%	626 100%

The social media ‘frequent users’ are mainly B&Bs (35% out of 173 different accommodation facilities), Hotels (26%) and Farm Houses (16%), but there also are guest houses (7.5%) and Holiday Houses (4%) as it may be seen in the graph below (Fig. 3.15).

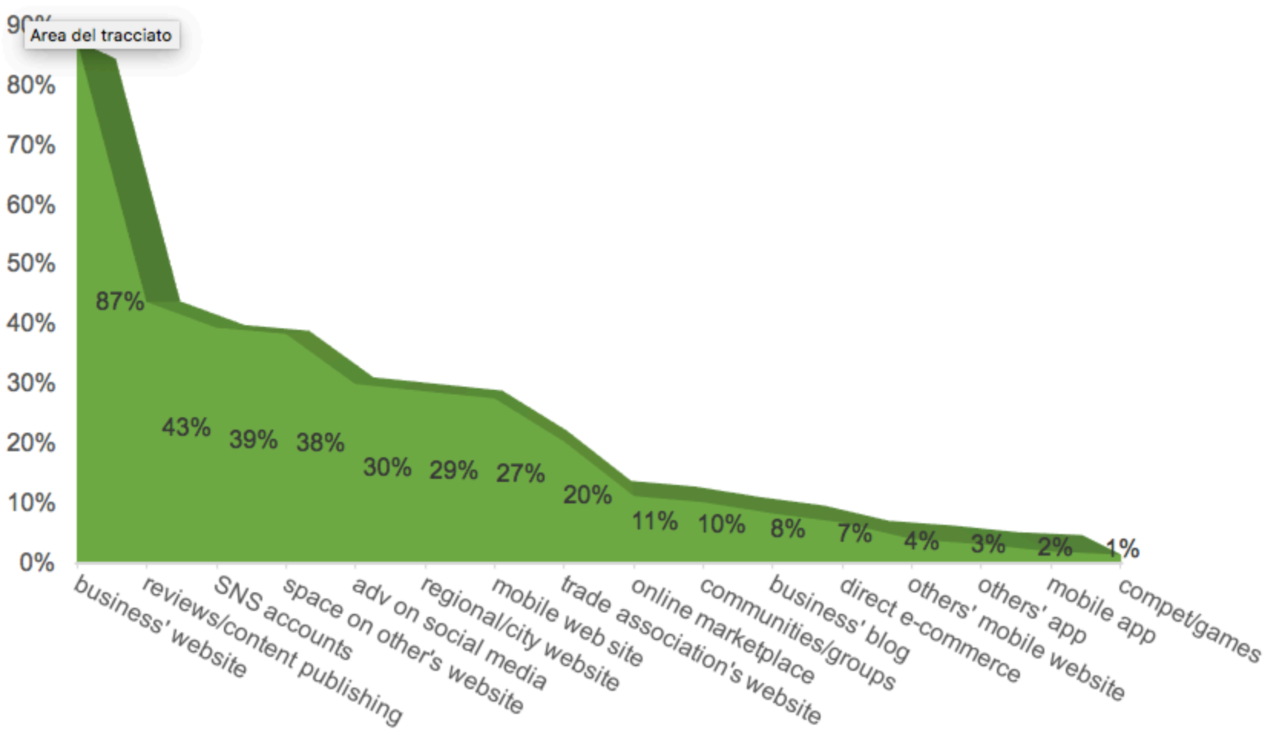
*Fig. 3.15 Frequence of use of social media*accomodation type*



Almost all Bed and Breakfasts (72% out of the total *frequent user* B&Bs) have a length of time in tourism and hospitality business of 1-5 years, whilst the *frequent user* Hotels have mostly (71%) a 20+ length of time in business. The majority of the *frequent users* do invest nothing in social media training or refresher courses (56%) and a 22.5% of them invests from >100€ <=1.000€, but the 50% of the *frequent users* invest up to 1,000€ in business promotion on social media and another 22.4% invest >1,000€ <3,000€.

Trying to deeper understand the **exent to which hospitality managers are using social media** (research question 1), with attention to the kind of activities the respondents play on social media, we took Tuten and Solomon (2013) theories as a point of departure (Fig. 3.1). To outline which of the "Four Zones" of social media (Community, Publishing, Entertainment, Commerce) the sample's entrepreneurs mostly use to achieve their objectives, we asked different questions. What came out is that, among all the possibilities offered by the net, the hospitality managers only use one or two media to promote their business, only covering the community and less the publishing area. The almost totality of the respondents (87%) do have and manage an own business website (Fig. 3.16). For an 11% of them the business' website is the only media used (not even a SNS account).

Fig. 3.16 Media used to promote the business on the web



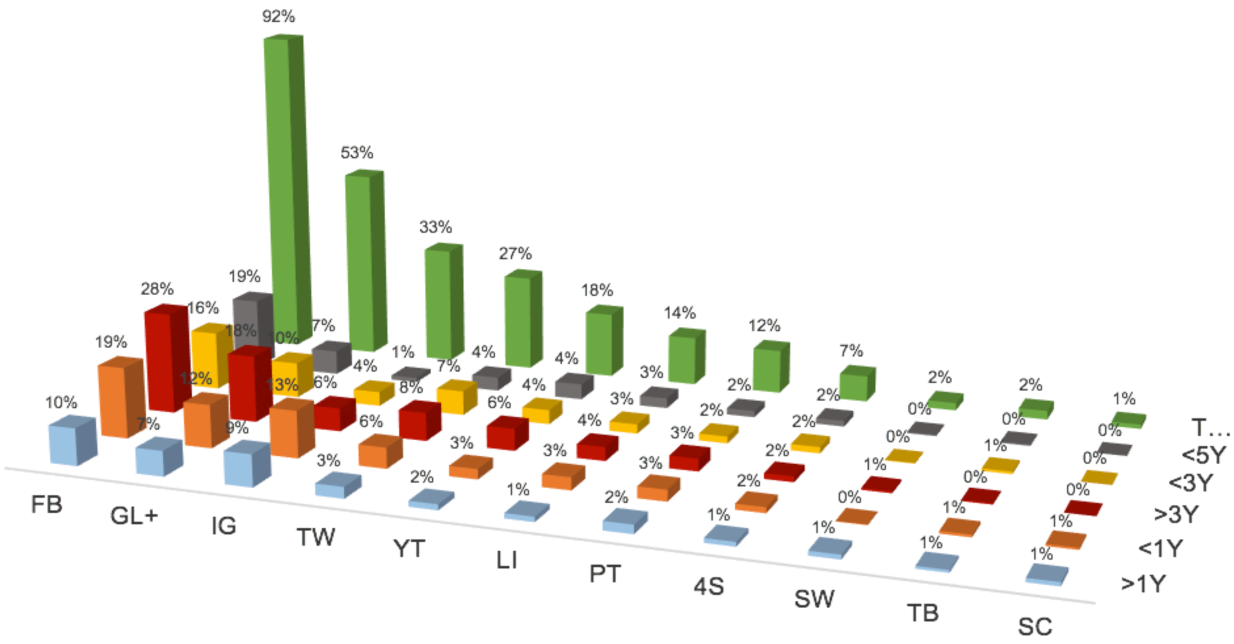
The 11% of hospitality managers only using their website as a media to promote their business, are mainly Bed and Breakfasts (39%) and Hotels (30%). Among those Hotels a 56% are located in the region Emilia Romagna and a 30% in the province of Rimini. Among the Bed and Breakfasts the majority are located in the region Marche (43%). In general, they manage the website not more than once a week (44%) or even more seldom (35% do access to the website less than once a month). Others using an own website also manage a space on a regional/municipal website (28%) trade association's website (8.6%) or any other kind of website (18%). Some other manage a social networking account (8%) and/or mobile site (11%) but only a 7% of the enterprises do use direct e-commerce and a few more (11%) use an online marketplace such as Booking, Expedia or others. The few respondents (75 businesses) that do not manage an own website have a space on a regional or municipal website (38%) or manage a social networking account (19%). The 88% of these are Bed and Breakfasts most of which located in the region Emilia Romagna (44%). The 25% of them manage their presence on social media at least once a day, a 42% at least once a week, the others even more seldom. In total, only a 39% of the interviewed practicioners admitted that they use SNS accounts as media to promote their business (Fig. 3.16), although the 93% of the sample has at least one account on Facebook (Fig. 3.17). This may be explained by the fact that managers have created accounts to promote their business but are not really using it.

The most used SNS among the hospitality practicioners, in line with the worldwide trend[59], is Facebook with a 93% of the businesses having an account, followed by Google + with a 53% and by far by Instagram and Twitter (Fig. 3.17). In any case, the majority of those having active accounts did create it less than 3 years ago. The 62% of those having a Facebook account, for instance, created it in the last 3 years and only the 21% of them have been using Facebook for more than 5 years (the 18% out of the whole sample of 626 respondents). The percentage of the "more experienced" SNS users reduces drastically for the other SNS. Those having a Facebook account are mainly Bed and Breakfasts (38%) being almost equally distributed among the regions Emilia Romagna (38% out of those managing a Facebook account) and Marche (42%) and a little less in Abruzzo and Hotels (28%), the 70% of which are located in the region Emilia Romagna. They mostly manage

[59] Facebook is the most popular network worldwide as of August 2017, ranked by number of active accounts. As it was announced last June by Mark Zuckerberg, Facebook now has 2 billion monthly active users. The social network was founded in 2004 and reached the 1 billion-user milestone in October 2012, meaning it has signed up around 580,000 new users a day since then. Around 3.7 billion people around the world have access to internet connections, and around 700 million of those are in China, where Facebook is banned, so at least two in every three people who could use Facebook every month do so. Available at: <www.telegraph.co.uk; www.statista.com> [accessed: 5 April, 2018]

their presence on social media (including the Facebook account) once a week (respectively the 42% of B&Bs and the 55% of Hotels). Only a 29% of the Hotels and a 26.7% of the B&Bs manage their accounts at least once a day.

*Fig. 3.17 Active social networking accounts*accounts life-time*



Approximately the same distribution in accomodation types, region of location and frequency of use may be found for the other SNS accounts apart for Twitter and Youtube which are much less used by B&Bs than by Hotels (Fig. 3.18). In general Facebook and Google+ are more used by B&Bs, which by contrast do very little use Youtube (only 15 B&B owners out of 249 B&B repondents, which equals to a 6% of total B&Bs and only a 3.6% on the total respondents), although this SNS is the most active social media platform in Italy according to the latest Hootsuite-We are social Digital Yearbook[60]. Hotels by contrast are the main users of Foursquare[61] which is a social networking site based on the users' reccomendations.

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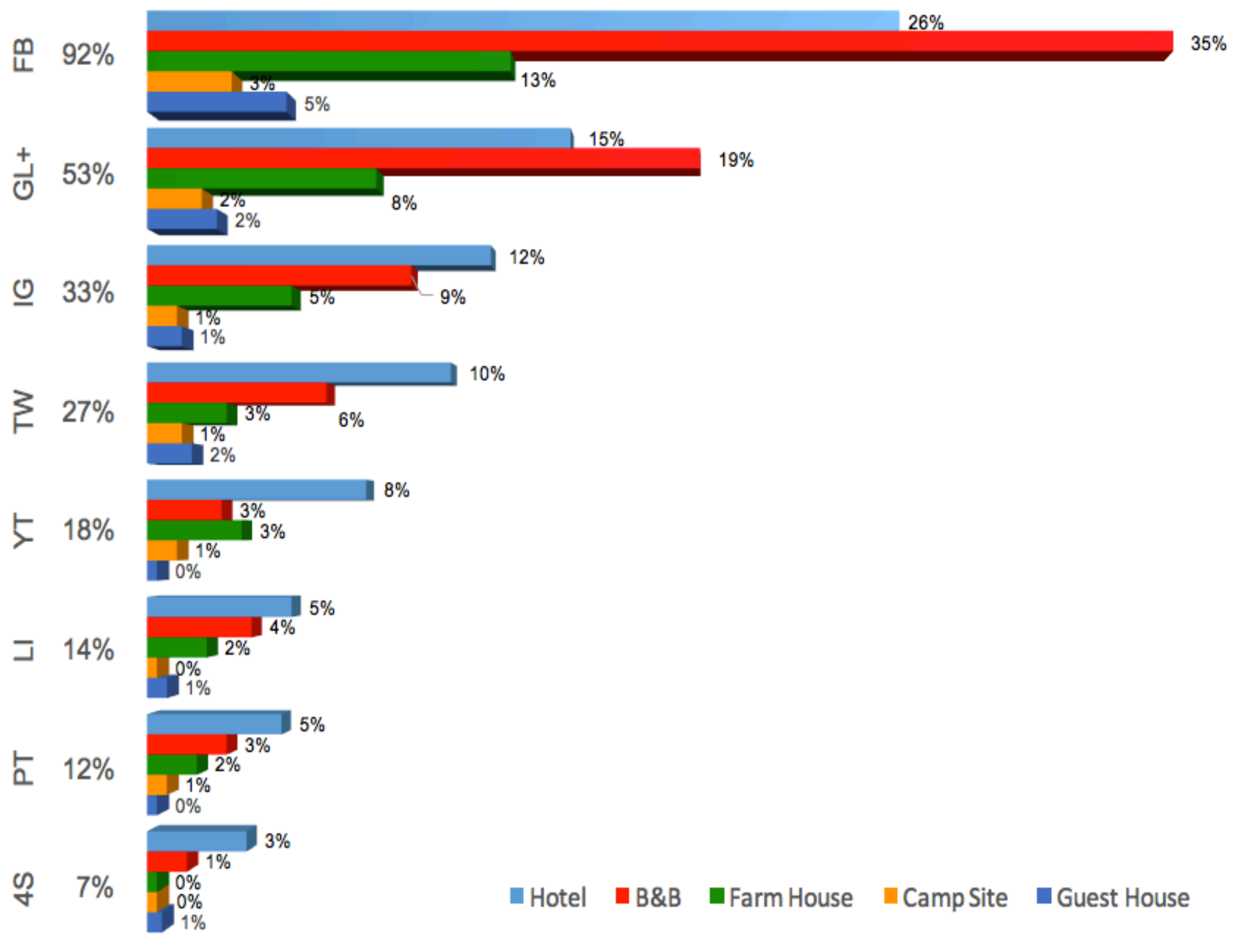
[60] 2018 Digital Yearbook – We are social & Hootsuite Available at: <https://digitalreport.wearesocial.com> [accessed: 3 June, 2018]

[61] Foursquare is a local search-and-discovery service mobile app which provides search results for its users. The app provides personalized recommendations of places to go to near a user's current location based on users' "previous browsing history, purchases, or check-in history". Source: Wikipedia available at: <https://en.wikipedia.org/wiki/Foursquare> [accessed: 3 June, 2018]

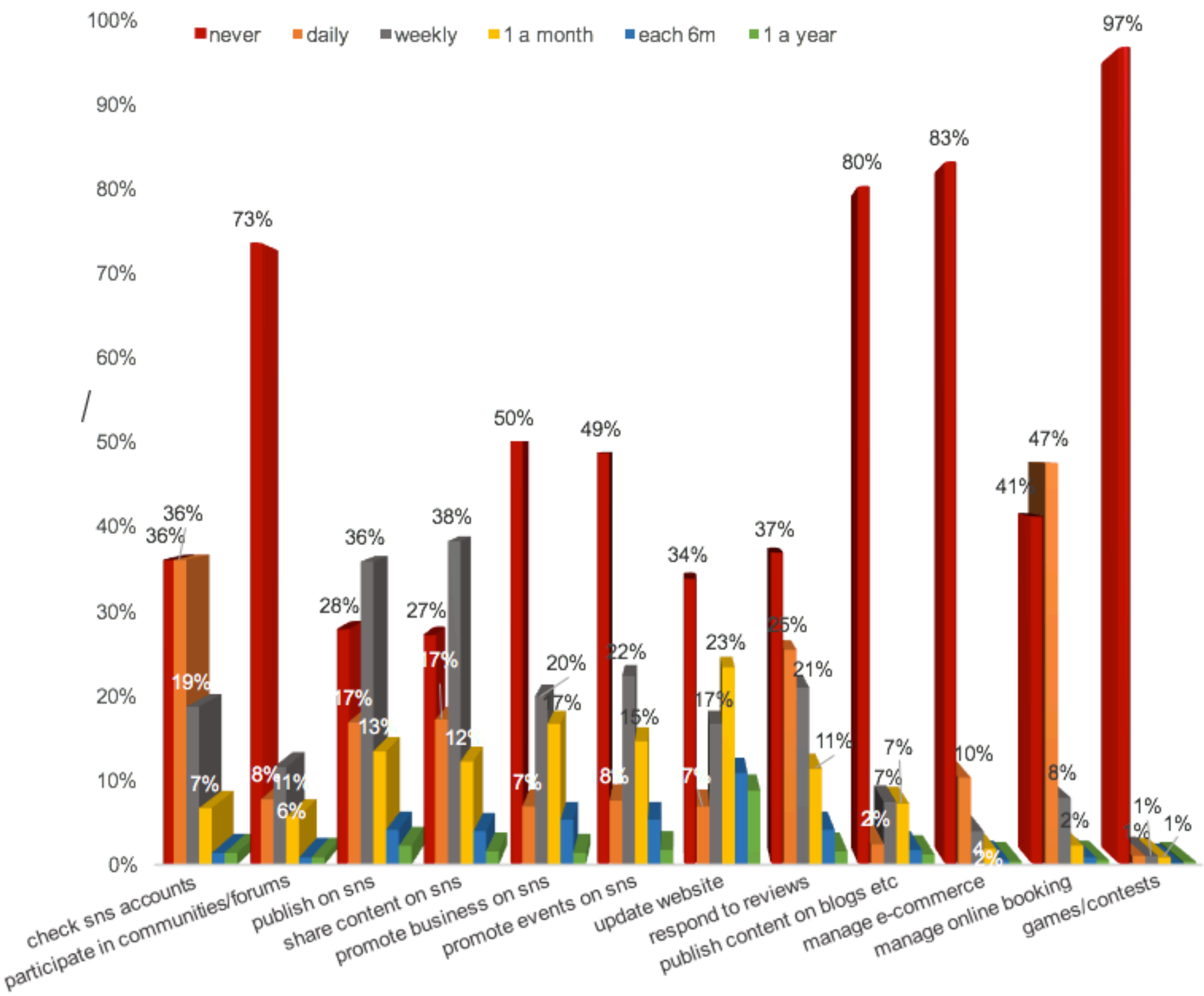
*Fig. 3.18 Active social networking accounts*accomodation type*[62]



But are those Social Networking accounts really active or have they just been opened and than abandoned or underused? To discover this, we asked the entrepreneurs what kind of activities they do play on social media and their frequency of use. The results helped us understand which of the "Four Zones" of social media are used by the hospitality practicioners to achieve their strategic objectives and as such the extent to which they are using socials (research question no. 1) against the massive amount of possibilities offered by the net. The activities which are more often (daily) played by the majority of the managers are *checking the SNS accounts* (but only a 36% of the respondents) and *managing the online booking* (47%) (Fig. 3.19).

[62] The graph does not show the categories in the set with values under 5%.

Fig. 3.19 Activities played on social media to promote the business[63]



But, if a 36% of the respondents do *check the social networking account* daily, only a 17% also *publish* or *share content on SNS* with the same frequency, while the majority just leave traces of their presence on the net once a week, publishing any kind of content. It is not difficult to understand the consequences of leaving a tourist without any reply from the hospitality business on its social account for days and days. The managers being engaged both with checking the *social networking account* daily and publishing or sharing content with the same frequency are only the 12% of the total respondents using social media and the 33% of those checking the SNS account daily. The 45% of these opens the account every day to just have a look, but publishes or shares content just once a week. Only a very tiny 7% of the accomodation companies using social media do use their SNS accounts daily

[63] The missing responses for each variable have been treated as *never* to get to the 584 total respondents using social media.

to *promote their business* and this may be still reasonable, but a 50% of them never uses the account at all to promote the company nor any events organized by them. Thus, the 92% of the hospitality enterprises of the Medium Adriatic Coast have at least one SNS account (mainly Facebook, cfr. Fig. 3.17), but the gross majority of them definetely underuses it or uses it too seldom to take advantage of the massive opportunities offered by the daily and instant connections and interactions passing by the main social networking accounts all over the world (Cfr. Chapter 1), both in terms of reach and engagement[64].

Also, *Responding to the reviews,* which, considering the impact of travel-related user-generated content on users' travel plans[65], is a very important activity for the brand reputation, is done daily by only a 25% of the respondents mainly Bed and Breakfasts (34%) and Hotels (29%). Out of these 63% of Hotels and B&Bs managers responding to the reviews daily, the 42% is located in the Region Emilia Romagna (of which 62% are Hotels) and the 31% in the Region Marche (70% of which are B&Bs).

A point of particular concern is the percentage of hospitality managers never responding to the reviews, i.e. 37% out of 584 respondents declaring to use social media. The majority of those never responding are Bed and Breakfasts (51%, which correspond to

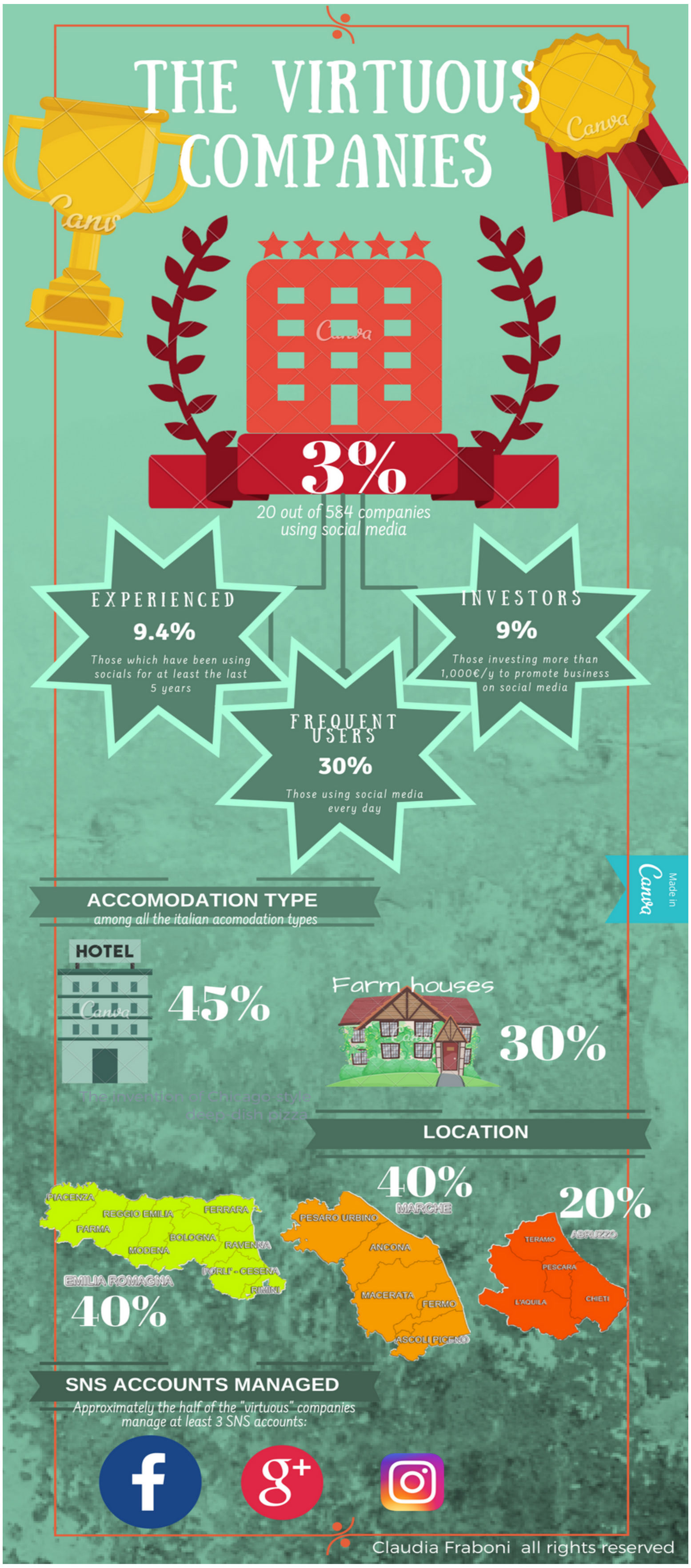
[64] "Social media reach is a media analytics metric that refers to the number of users who have come across a particular content on a social platform. In comparison, an impression is the total number of circumstances where a content has been shown on a social timeline, meanwhile, engagement looks at how people interact with the content that they see on a social platform such as like, share or retweet". Source: Wikipedia available at < https://en.wikipedia.org/wiki/Social_media_reach > [accessed: 3 June, 2018]. A study on Facebook engagement rate per post across different industries shows how tourism and Hospitality gets among the highest reach 0.21% against 0.10% of health and beauty and 0.24% of Food and Beverage and Influencer which get the highest engagement calculated by average engagement rate per post on Facebook. The median across all industries is 0.16%. Source: 2018 Social Media Industry Benchmark Report. "Hotels and Resorts boasted the highest Twitter engagement of any industry we surveyed, and ranked high for both Facebook and Instagram engagement as well. Customers are eager to engage with these brands from home to browse amenities and take advantage of responsive customer service before booking their next vacation". Available at: <https://www.rivaliq.com/blog/2018-social-media-industry-benchmark-report/> [accessed: 13 July, 2018]

[65] Alton Y. K. Chua and Snehasish Banerjee (2013) write that: "Given the importance of reviews in the context of tourism, numerous studies have been conducted to examine their impact on users' travel plans. For instance, in a study conducted to analyze the impact of reviews on the choice of holiday accommodation, it was found that more than 80% of users purchased accommodation recommended by reviews. (…) It appears that users are generally willing to trust reviews and embrace vulnerabilities based on favorable expectations from their online peers".

the 47% of the total amount of B&Bs using social media), while a 18% are Hotels (24% of the total Hotels using social media) and a 12.6% Farm Houses (34% of the total Farm Houses using social media). In any case, more than a half of them (51%) have up to 6 beds and a lenght of time in business of maximum 5 years (56%). They mainly come from the Regions Emilia Romagna (42%) and Marche (41%). Perfectly in line with the average frequency of use of social media by the hospitality managers, the 21% of the sample responds *weekly* to the reviews. Once again, a too long waiting for the tourist generating content and looking for any kind of interaction with the accomodation businesses, above all if we consider that the vast majority of the people today are engaged and connected 24/7/365. In light of this, the fact that the 36% of the hospitality managers do not even *check the SNS accounts* (just check without posting), the 73% never *participates in forums and communities*, the 83% do not *use direct e-commerce* and the 41% never manages the *online booking* says a lot about the awareness of the accomodation practicioners about the massive potential that social media offer to become highly visible and for reaching and interacting with tourists. It looks like nearly all the companies are only using the social community area of social media and in minor part the social publishing area. But very few companies invest their time and money in the social commerce area, while the social entertainment is mostly unknown and unexplored. The data analysed till this stage of the research, reveal that hospitality managers are underusing social media, certainly losing part of the opportunities offered by the ICTs and missing to overcome the challenges.

The most "virtuous" hospitality companies, i.e. the frequent users (those using social media every day), experienced (which have been using socials for at least the last 5 years) and top investors (investing more than 1,000€ a year to promote their business on social media) are only a 3% of the respondents using social media (20 out of 584). They are mainly Hotels (45%) and Farm Houses (30%), while Bed and Breakfasts are only one out of 20 "virtuous" businesses, and are located preeminently (40% each) in the Region Marche and Emilia Romagna (See Infographic in Fig. 3.20). The "virtuous" businesses have all, but one, more than 7 beds (50% of them have more than 50 beds) and a length of time in the tourism business of more than 5 years (a 65% of the companies have an experience longer than 10 years) and the 35% have more than 10 employees. Approximately the half of the "virtuous" companies manage at least 3 SNS accounts (most used: FB, G+ and IG cfr.Fig. 3.17), and post contents on their accounts daily. A 35% of them also share videos or photos daily.

Fig. 3.20 Virtuous companies Infographic



After a deep analysis of the Medium Adriatic Hospitality suppliers' use and familiarity of social media we may affirm that, apart for a miniscule minority, the praticioners still have a long way to run to reach the consumers level of connection to the net and their need of interaction and communication during all the stages of travel. The road may be shortened by implementing and executing a social media strategy which may allow to set and pursue SMART[43] goals. With the second research question we tried to understand in which phase of the social media marketing maturity hospitality pratictioners belonging to our sample may be set. This will help understand how far the gap between the suppliers and the consumers may be and will give us the possibility to suggest appropriate managerial implications.

2. Do they have a social media marketing strategy?

As said, Social media, due to their broad and ubiquitous reach, low overhead costs and versatility, are playing an ever-increasing role in nearly all kind of industries, but even more in Tourism and Hospitality where consumers are asking for instant interaction during all stages of Travel. The viral component of social media makes them especially attractive, as messages can achieve enormous reach without big marketing investments. Indeed, Social applications can be almost free and even serving more sophisticated communities through cheaper comparing with a big sized advertising campaign (Li and Bernoff, 2008). Unfortunately, too many companies make the mistake of treating these media as disparate platforms or silos that operate independently of each other. Instead, companies should view their approach to social media as an integrated strategy that brings consumer experiences to the forefront, all whilst recognizing that Internet-based media does not replace traditional media (Kirtis, Karahan, 2011). Or else, it is no longer enough to use social media without having a goal or a plan or merely incorporating them as standalone elements of a marketing plan. To fully capitalize on the potential of social media platforms, tourism and hospitality organizations with a social media presence should move forward implementing an effective strategy that clearly outlines their audience, goals, messaging, content and growth objectives. It is also imperative that organizations perform a regular, rigorous evaluation of social media platform performance and that they utilize this information to improve online performance and engagement (Cfr. Research question no. 3).

With the second research question, as already said, we aimed to understand whether the tourism and hospitality companies have a social media strategy or are under way for it and as such to classify the organizations according to the Tuten and Solomon's social media marketing stages of maturity (Fig. 3.2). Considering our sample of 584 accomodation businesses using social media, a 57.2% have not implemented a strategy or a marketing plan for their social media activities on the web (Fig. 3.21; Table 3.7)

Fig. 3.21 Have you got a social media marketing strategy for your business?

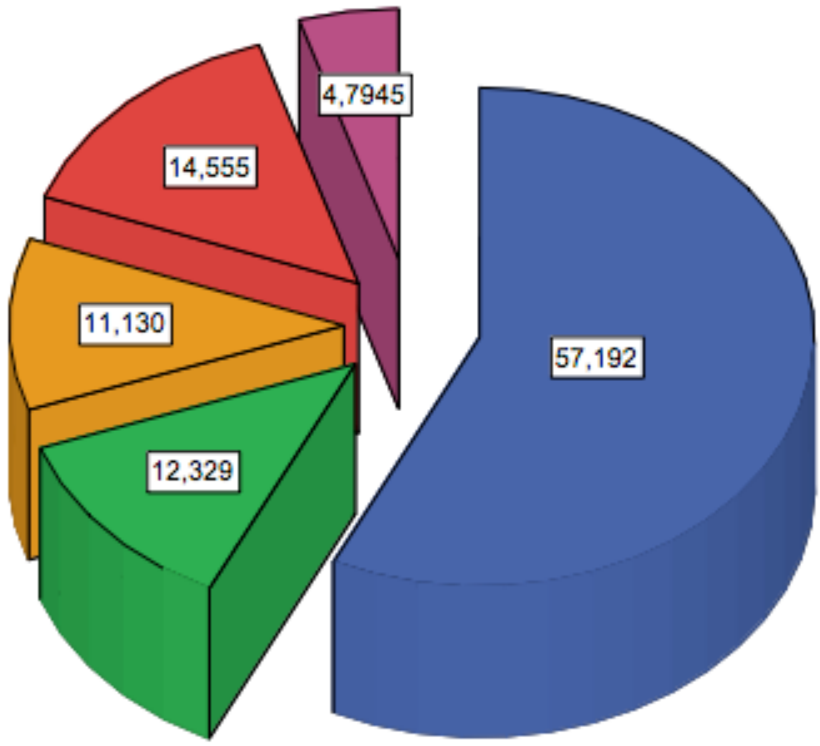


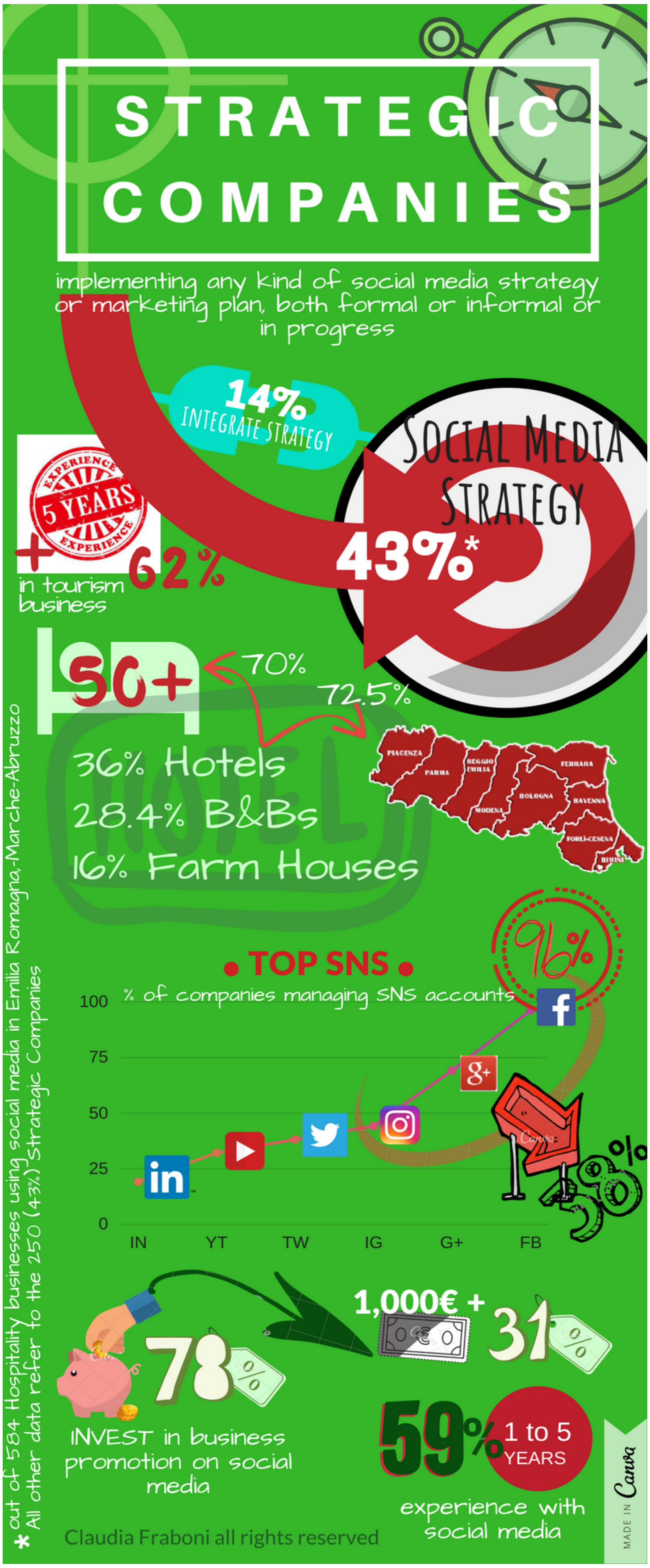
Table 3 7 Have you got a social media marketing strategy for your business?

Have you got a social media marketing strategy for your business?	Frequency	%
no	334	57.2
yes, both	72	12.3
strategy is in progress	65	11.1
yes but it is an informal strategy	85	14.6
we have a marketing plan	28	4.8
Total	584	100

This mainly means that they have set no goals and that they probably publish on the net without following a *fil rouge* or a unique idea or project. This also means that they are not properly measuring the effects of what they do on the net loosing a considerable amount of opportunities to gain more profitable results from their activity on social media. Only a rough 17.5% of the companies, in effect, have a formal strategy or a marketing plan, whereas, another 14.5% have an formalized strategy to guide their actions and the 11.1% have an ongoing strategy.

The "strategic" accomodation companies (Fig. 3.22), i.e. those having implemented any kind of plan or strategy, both formal or informal or even only in progress are, therefore, the 42.8% of all the respondents using social media (250 out of 584). Among these, the 36% are Hotels, the 28.4% are Bed and Breakfasts and the 16% are Farm Houses and Country Houses. Hotels having implemented any kind of plan or strategy are mainly located in the Region Emilia Romagna (72.5%) and have nearly all (70%) more than 50 beds. The 33% of those Hotels also manage other one or two businesses and the 14% is part of a group. The "strategic" Bed and Breakfasts are mainly located in the Region Marche (44%) and Emilia Romagna (42%) and the 15.5% of them manages up to three accomodation companies. The 62% of the "strategic" companies have a lenght of time in the tourism business of more than 5 years including a 46% which have a 10+ years of experience in the hospitality industry. The 34.4% of these organizations have been using social media for more than 5 years, but the majority (59%) is in the range of experience of 1 to 5 years. A very good part of them (39%) plays any activity on social media every day, but the 48.4% waits a week before checking their accounts or posting or sharing any content. Nearly the totality of the strategic companies (96%) manage a Facebook account (the 72.5% of which has been managing the account since the last 3 years), then, descending a lower number of hospitality organization also do manage a Google+ account (69%), an Instagram one (44%), a Twitter account (38%) a Youtube account (32%) and a Linkedin one (19%). The 38% manages at least 3 SNS accounts including FB, G+ and IG. Only a 31.2% of the "strategic" ones, though, invest more than 1,000€ for promoting their business on social media and another 47.2% invests some money less than that amount. Anyway they invest very little in training or refresher courses (only a 44% invest less than 1,000€ a year) a 50% even invests absolutely no money.

Fig. 3.22 Strategic companies Infographic



Among the 42.8% hospitality organizations having implemented a social media strategy or a marketing plan, both formal or informal or still in progress, only a 13.6% has included the social media strategy into a wider plan or document, which may be the marketing plan or the company's general strategy (Table 3.8). What is quite disappointing is the fact that the 85% of the hospitality organizations having implemented both a social media marketing strategy and a marketing plan are still not integrating their strategies keeping them separate. The 36% of those integrating strategies are Farm Houses (21% Hotels and 21% B&Bs) mainly located in the Region Marche (75%), where more than the half "integrating" companies operate. Quite surprisingly none but two hospitality enterprises integrating their strategies have other businesses and none but 4 do belong to a group of companies. The 48% of the "integrating" companies do play any kind of activity on social media every day, the remaining 52% check their SNS accounts, posts or shares content once a week. The 79% of these invest to promote their business on social media but only the 36% invests more than 1,000€ a year (nearly a half of those investing any money in promotion). They also invest in training or refresher courses (50%) but only 2 companies invest more than 1,000€ a year, while the rest invest even less than 100€ yearly (the 43% of those investing in training).

Out of the 250 "strategic" companies, of which a 10% is part of any group of enterprises working in tourism (71%) or in other different industry (which is the 51% of all the hospitality businesses belonging to a group, 24 out of 47), only 5 companies have a strategy integrated with the other organizations.

*Table 3.8 Social media marketing strategy*Integrated strategy*

Is your social media strategy integrated with the general strategy of the company?		**yes**	no	Total
Do you have a social media marketing strategy?	yes, both	10	60	70
		4,1%	24,8%	28,9%
	strategy is under way	6	58	64
		2,5%	24,0%	26,4%
	yes but it is an informal strategy	10	71	81
		4,1%	29,3%	33,5%
	we have a marketing plan	7	20	27
		2,9%	8,3%	11,2%
Total		33	209	242
		13,6%	86,4%	100,0%

To answer to the second research question, we may certainly affirm that the great part of the hospitality companies are still in the first step in the social media marketing maturity scale, that what Tuten and Solomon (2013) call the Trial Phase (Fig. 3.2). This means that in their approach to social media marketing the majority of the tourism praticitioners of our sample are still exploring: they may have opened one or more SNS accounts, trying to manage their activities and presence on the net without a strategy or an editorial plan i.e. the social media platforms are set up before any real goals or objectives have been planned for them. In this phase, businesses generally do not have any sort of guidelines or processes for their social media strategy.

Being the strategy so important for successful social media marketing, we tried to understand which variables of our database may be positevely related with the social media strategy implemention by estimating the probability whether an hospitality company is likely to implement a social media strategy (y) or not, relating to a set of variables (x^1, x^2, x^3...).

Having to do with categorical and dichotomous variables we found that the best way to treat this matter was by using a Logistic Regression Analysis[66]. Generally, logistic regression is well suited for describing and testing hypotheses about relationships between a categorical outcome variable and one or more categorical or continuous predictor variables (Peng, Lee, Ingersoll, 2002). It is an instance of classification technique to be used to predict a qualitative response. It measures the relationship between the categorical dependent variable and one or more independent variables by estimating probabilities using a logistic function, which is the cumulative logistic distribution. The logistic regression analysis helpes discovering how the typical value of the dependent variable (social_media_strategy) changes when one of the independent variables is adjusted and others are held fixed[67].

[66] Logistic regression was proposed as an alternative to the ordinary least squares (OLS) regression for the analysis and prediction of a dichotomous outcome (as in our case: whether a company adopts a strategy or not) in the late 1960s and early 1970s (Cabrera, 1994), and it became routinely available in statistical packages in the early 1980s. (Peng, Lee, Ingersoll, 2002) An Introduction to Logistic Regression Analysis and Reporting.

[67] Logistic Regression is part of a larger class of algorithms known as Generalized Linear Model (glm). The fundamental equation of generalized linear model is: $g(E(y)) = \alpha + \beta x1 + \gamma x2$

The equation used in Logistic Regression, considering that in this case we are concerned about the probability of outcome of the dependent variable (success (p) or failure(1-p) is: $log\left[\frac{p}{1-p}\right] = y$

The central mathematical concept that underlies logistic regression is the logit, the natural logarithm of an odds ratio[68]. Logistic regression solves these problems by applying the logit transformation to the dependent variable. In essence, rather than modeling the Y directly, logistic regression models the probability that Y belongs to a particular category (James et al. 2014)[69].

The logistic regression analysis was carried out in R Studio version 1.1.447 (Cfr. R code in Appendix).

We first of all created a logistic model to predict how likely an hospitality company is to implement a social media strategy, depending on a series of independent variables such as the region of provenance, the type of accomodation, the fact that other hospitality enterprises are owned, being part of a group and so on. A baseline model was created including all variables listed in the database (accomodation.xls) to see which variables are positevely related to the strategy implementation. It turned out that only a small number of variables in the baseline model were statistically significant (had the smallest p-values). Then we predicted the model and found the probabilities for the social media strategy implementation to occur. The baseline model predicts the most likely event, that there is no

[68] Odds are the ratio between probabilities: the probability of an event favorable to an outcome and the probability of an event against the same outcome. On the other hand, probability is the ratio between the number of events favorable to some outcome and the total number of events. Probability is constrained between zero and one and odds are constrained between zero and infinity. And odds ratio is the ratio between odds. The importance of this is that a large odds ratio (OR) can represent a small probability and vice-versa.

[69] The logit is the natural logarithm (ln) of odds of Y, and odds are ratios of probabilities (π) of Y happening (i.e., a company implementing a social media strategy) to probabilities ($1 - \pi$) of Y not happening (i.e., a company not implementing a strategy). Let y be the binary outcome variable indicating failure/success with 0/1 and p be the probability of y to be 1, p = prob(y=1). Let x1, .., xk be a set of predictor variables, then the logistic regression of y on x1, …, xk estimates parameter values for β0, β1, . . . , βk via maximum likelihood method of the following equation: logit(p) = log(p/(1-p))= β0 + β1*x1 + … + βk*xk
In terms of probabilities, the equation above is translated into: p= exp(β0 + β1*x1 + … + βk*xk)/(1+exp(β0 + β1*x1 + … + βk*xk)). Source: <https://stats.idre.ucla.edu/other/mult-pkg/faq/general/faq-how-do-i-interpret-odds-ratios-in-logistic-regression> [Accessed on 1 July 2018].

media strategy implementation (57.19% against 42.8%)[70]. The performance of the baseline model was:

Table 3.9 Confusion matrix of the baseline model[71]

	False	True	Total
No SMS implementation	264	70	334
SMS implementation	101	149	250
Total	365	219	584

Baseline model performance[72]: [1] 0.7071918
AIC=713.88

In this case, the logistic regression correctly predicted the occurance of a social media strategy implementation by the accomodation companies (correct predictions showed on diagonal values in Table 3.9) 70.7% of the time (model performance*100) with an error rate of 29.3% (given by the sum of the off-diagonal values/584*100).

In order to see if a better performance was possible with a new model obtained by selecting a different set of more significant variables, we applied a backward stepwise function[73]. This way, we found the subset of variables (Table 3.10) in the data set resulting in the best performing model, a model that lowers prediction error:

[70] Which is given by the sum of the probabilities for the social media strategy implementation not to occur (No SMS Implementation) divided by the number of total observations (nrow(newdata)) and by the sum of the probabilities for the event to occur always divided by the total observations (584 nrow (newdata)).

[71] The confusion matrix determines how many observations were correctly or incorrectly classified (James, 2014). Hence our model correctly predicted that the social media strategy would be implemented by 149 accomodation companies and that it would not be implemented by 246 companies, for a total of 149 + 246 = 395 correct predictions.

[72] The model performance was obtained by the sum of the diagonal values on the confusion matrix in Tab. 3.7 (264 + 149) divided by the total observations (nrow(newdata)= 584)

[73] The stepwise regression (or stepwise selection) consists of iteratively adding and removing predictors, in the predictive model, in order to find the subset of variables in the data set resulting in the best performing model, that is a model that lowers prediction error.

There are three strategies of stepwise regression (James et al. 2014, P. Bruce and Bruce (2017)):

1. Forward selection, which starts with no predictors in the model, iteratively adds the most contributive predictors, and stops when the improvement is no longer statistically significant.

Table 3.10 Social media strategy implementation or not by independent variables: Logistic regression

	Dependent variable: social_media_strategy					
Independent variables:	Odds Ratio[27]	Estimate[74]	Std. Error[75]	z value[76]	Pr(>|z|)[77]	
Constant (Intercept)	3.866635	-0.9502	0.5301	-1.793	0.073049	.
other_accommodation_owned	2.799043	1.0293	0.3059	3.365	0.000766	***
frequence_manag_sm once a week	3.256286	1.1806	0.5220	2.262	0.023720	*
frequence_manag_sm once a day	3.781354	1.3301	0.5315	2.503	0.012328	*
frequence_manag_sm once a month	1.247584	0.2212	0.5664	0.391	0.696117	
frequence_manag_sm never	8.353692	-0.1799	0.7533	-0.239	0.811262	
invest_training >1.000€ <=5.000€	1.302189	0.2640	0.8804	0.300	0.764240	
invest_training >5.000€ <=10.000€	6.277801	13.3499	1455.3976	0.009	0.992681	
invest_training 0€	5.054186	-0.6824	0.2023	-3.374	0.000742	***
spend_promotion >1.000€ <=5.000€	2.602385	0.9564	0.2786	3.433	0.000596	***
spend_promotion >10.000€	1.829432	14.4195	575.8792	0.025	0.980024	
spend_promotion >5.000€ <=10.000€	6.272872	1.8362	1.1075	1.658	0.097322	.
spend_promotion 0€	4.922479	-0.7088	0.2265	-3.129	0.001757	**

Observations	584
Akaike Inf. Crit. (AIC)	686.880

Note: '***' 0.001 '**' 0.01 '*' 0.05 '.' 0.1 ' ' 1

1. Backward selection, which starts with all predictors in the full model, iteratively removes the least contributive predictor and stops when you have a model where all predictors are statistically significant.

2. Stepwise selection (or sequential replacement), which is a combination of forward and backward selections. You start with no predictors, then sequentially add the most contributive predictors (like forward selection). After adding each new variable, remove any variables that no longer provide an improvement in the model fit (like backward selection). Source < http://www.sthda.com/english/articles/37-model-selection-essentials-in-r/154-stepwise-regression-essentials-in-r/> [Accessed on 2 August 2018] The choice of using Backward selection was given by the fact that, in our case, the number of samples n is larger than the number of variables p. In fact, the Forward and Stepwise selections can be instead only applied to fit the full model, where the number of samples n is inferior to the number of predictors p.

[74] **Estimate** represents the regression coefficients value in log-odds form. Here, the regression coefficients explain the change in log(odds) of the response variable for one unit change in the predictor variable

[75] **Std. Error** represents the standard error associated with the regression coefficients

[76] **Z value** tests the null that the coefficient is equal to zero. For a 5% significance, the z-value should fall outside the ±1.96.

[77] **Pr(>|z|)** shows the two-tailed p-values testing the null hypothesis that the coefficient is equal to zero (i.e. no significant effect). The usual value is 0.05, by this measure none of the coefficients have a significant effect on the log-odds ratio of the dependent variable. Source < https://www.princeton.edu/~otorres/LogitR101.pdf> [Accessed: 5.07.2018]

The results in Table 3.10 indicate how the typical value of the dependent variable (social_media_strategy) changes when one of the independent variables is adjusted and others are held fixed. Only 3 variables (other_accomodation_owned, invest_training 0€, spend_promotion >1.000€ <=5.000€) showed high level of significance. This fitted model says that, holding the variable other_accomodation_owned, for instance, at a fixed value, the odds of implementing a social media strategy (social_media_strategy = 1) over the odds of not implementing a social media strategy (social media strategy = 0) is exp.(1.0293) = 2.799, which is approximately 3 times higher. In terms of percent change, we can say that the odds for implementing a social media strategy, holding the variable other_accomodation_owned at a fixed value is 173% higher than the odds for not implementing it.

Comparing the Akaike Information Criteria (AIC)[78] of the baseline model with the one of the new model (Table 3.11) we may see that the first one has a lower AIC: the new model has AIC: 686.88 whereas the baseline model reports an AIC: 713.88. Thus, considering that the AIC estimates the relative information lost by a given model and, quite obviously, the less information a model loses, the higher the quality of that model, the new model results to be more accurate.

Table 3.11 Confusion matrix of the new model:

	False	True	Total
No SMS implementation	265	69	334
SMS implementation	95	155	250
Total	360	224	584

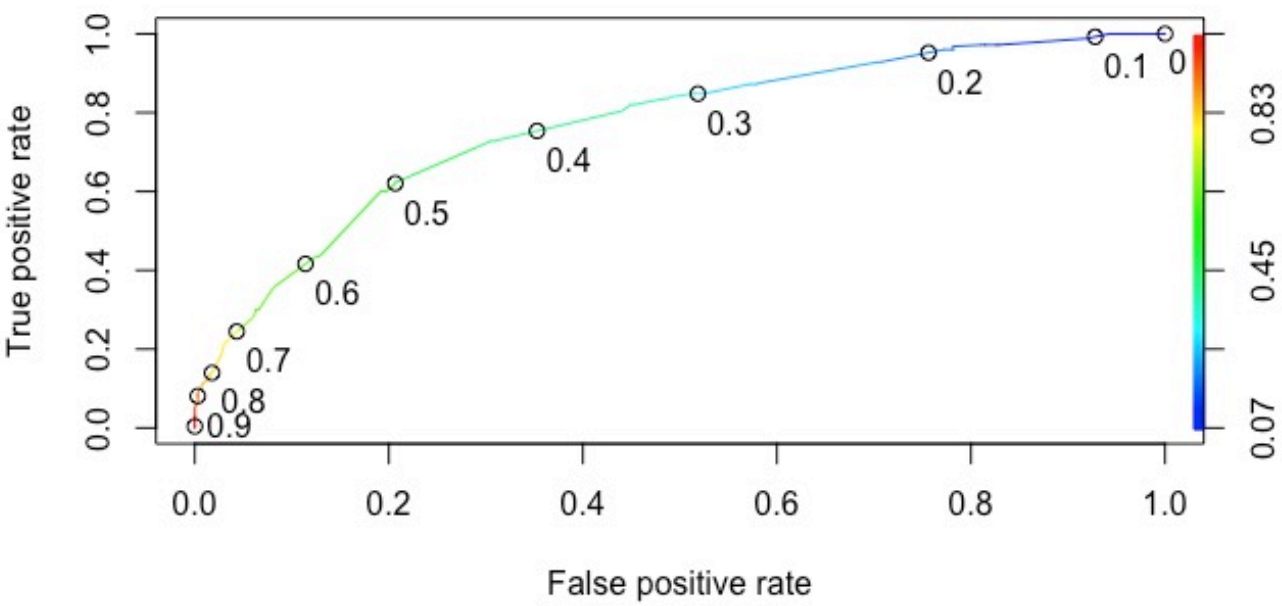
New model performance: [2] 0.7191781.

[78] The Akaike information criterion (AIC) is an estimator of the relative quality of statistical models for a given set of data. Given a collection of models for the data, AIC estimates the quality of each model, relative to each of the other models. Thus, AIC provides a means for model selection. AIC is founded on information theory. When a statistical model is used to represent the process that generated the data, the model will almost never be exact; so some information will be lost by using the model to represent the process. AIC estimates the relative information lost by a given model: the less information a model loses, the higher the quality of that model. (In making an estimate of the information lost, AIC deals with the trade-off between the goodness of fit of the model and the simplicity of the model). The diagonal elements of the confusion matrix indicate correct predictions, while the off-diagonals represent incorrect predictions. Source < https://en.wikipedia.org/wiki/Akaike_information_criterion> [Accessed 3 July 2018], (James et al. 2014)

This means that the performance of the new model [2], which equals to a 72% rate of correct predictions (diagonal values on the confusion matrix Table 3.11) and an error rate of 28% (off-diagonal values/total observations*100), is slightly higher than the one of the baseline model [1] that was 70.7% with an error rate of 29.3%.

The accuracy of the new model obtained with the backward stepwise function, which returned the subset of variables (Table 3.10) in the data set resulting in the best performing model, may be also assessed through a ROC Curve (Fig. 3.23)[79]. The Receiver Operating Characteristic (ROC) summarizes the model's performance by evaluating the trade-offs between true positive rate (sensitivity) and false positive rate (1- specificity).

Fig. 3.23 ROC Curve



The area under curve (AUC), referred to as index of accuracy (A) or concordance index, is a perfect performance metric for ROC curve. Higher the area under curve, better the prediction power of the model. In our case the AUC is high enough to assess the model accuracy.

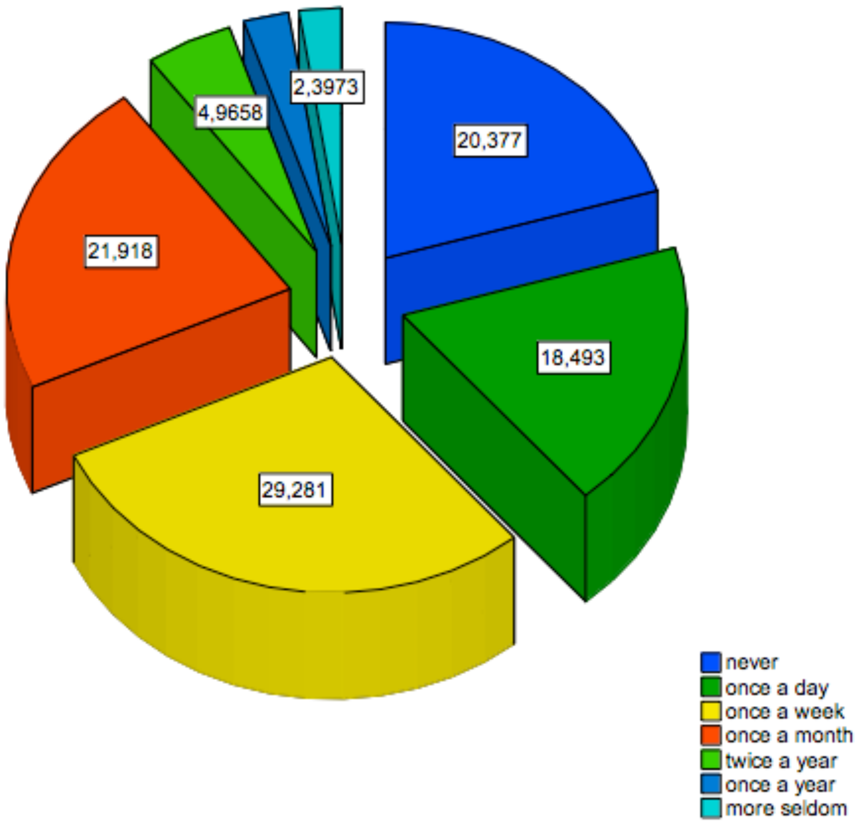
[79] The ROC curve is created by plotting the true positive rate (TPR) against the false positive rate (FPR) at various threshold settings. The true-positive rate is also known as sensitivity. The false-positive rate is also known as the fall-out or *probability of false alarm* and can be calculated as (1 − specificity). The ROC curve is thus the sensitivity as a function of fall-out. Source < https://en.wikipedia.org > [Accessed on 1 August 2018]

3. Do they measure the impact of social media on their business?

The measuring of the impact of the activity on social media is normally linked with the strategy implementation, in the sense that if a social media strategy has been formulated and executed by an organization, it will certainly include a framework of metrics to measure the goals fixed. But, of course, this does not exclude that companies having not implemented a strategy may be interested or may be smart enough to measure the impact of social media on their business, nor that companies with a strategy may disattend the goals measurement. In any case a fundamental prerequisite for managing social media is their effective measurement. In order to aknowledge the customers' actions and reactions and subsequently size or fit the social media activity, but also to understand the value of any activity for the business.

With the third research question we tried to reveal the consciousness of the hospitality managers about the immense and vast potential of social media on business success through their awareness about the importance of measuring its impacts. First of all we asked the Hospitality pratictioners whether they measure at all the effects of their activity on social media and with which frequency (Fig. 3.24).

Fig. 3.24 Frequency of use of metrics on social media - percentages



There still is a quite considerable part (20.4%) of hospitality managers in our sample, which never measures the impact of their activity on social media. The 119 enterprises (out of 584 using SM) never tracking metrics are mainly Bed and Breakfast (45.4%), fewer Hotels (22%), predominantely located in the Regions Emilia Romagna (44.5%) and Marche (37%). Nearly the totality of them do not belong to groups (93%) and do not manage other enterprises (92%). They have a length of time in the tourism business of more than 5 years (the 55% of them, while another 38.6% has 1 to 5 years experience in the hospitality industry) and have been using social media for 1 to 5 years (at least the 60 % of them) but only a 16% of them uses socials every day. Out of these 119 companies the 81.5% do not have a social media strategy and 7.6% have a strategy in progress (Table 3.12).

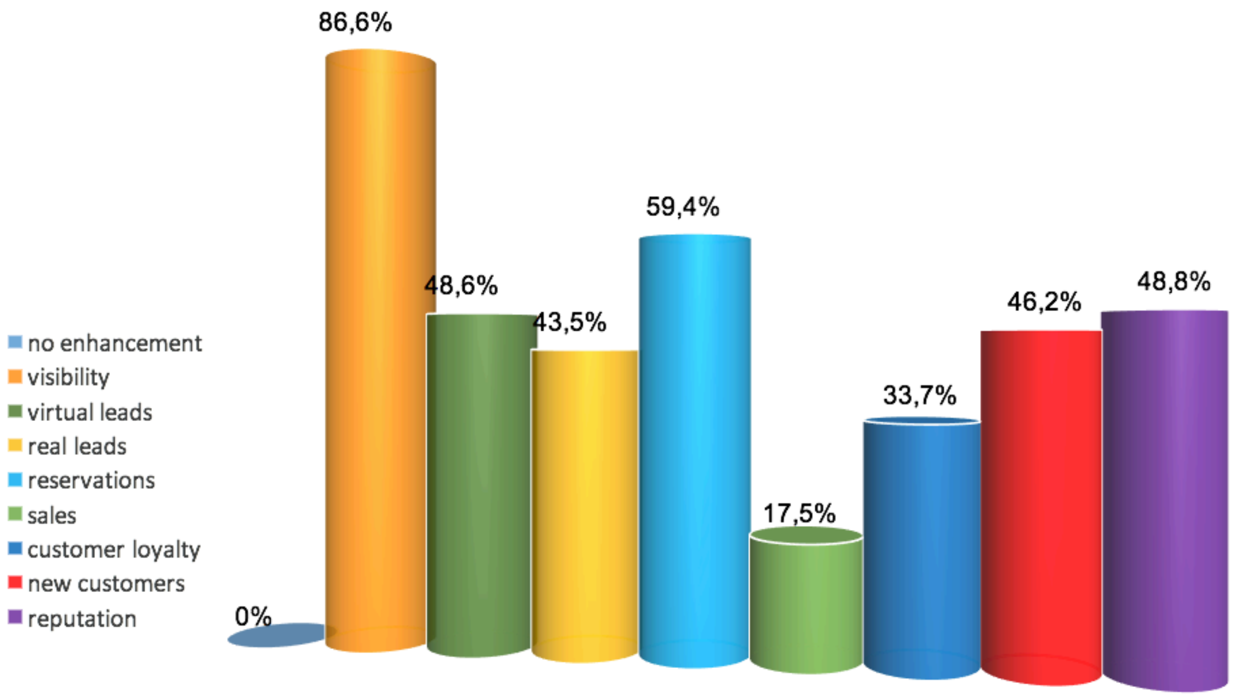
*Table 3.12 Measurement of the impact of social media activity*social media marketing strategy*

		Do you have a social media marketing strategy?						
		no	yes, both	strategy is under way	yes but it is an informal strategy	we have a marketing plan	Total	
Do you measure the impact of social media activity?	mai	97	5	9	7	1	119	count
		81.5%	4.2%	7.6%	5.9%	.8%	100%	%row
		16.6%	.9%	1.5%	1.2%	.2%	20.4%	%tot
	once a day	57	22	8	14	7	108	
		52.8%	20.4%	7.4%	13.0%	6.5%	100%	
		9.8%	3.8%	1.4%	2.4%	1.2%	18.5%	
	once a week	75	34	21	35	6	171	
		43.9%	19.9%	12.3%	20.5%	3.5%	100%	
		12.8%	5.8%	3.6%	6%	1%	29.3%	
	once a month	70	8	18	19	13	128	
		54.7%	6.3%	14.1%	14.8%	10.2%	100%	
		12%	1.4%	3.1%	3.3%	2.2%	21.9%	
	twice a year	15	3	1	10	0	29	
		51.7%	10.3%	3.4%	34.5%	0%	100%	
		2.6%	.5%	.2%	1.7%	0%	5.0%	
	once a year	10	0	5	0	0	15	
		66.7%	0%	33.3%	0%	0%	100%	
		1.7%	0%	.9%	0%	0%	2.6%	
	more seldom	10	0	3	0	1	14	
		71.4%	0%	21.4%	0%	7.1%	100%	
		1.7%	0%	.5%	0%	.2%	2.4%	
	Total	334	72	65	85	28	584	
		57.2%	12.3%	11.1%	14.6%	4.8%	100%	

Among the greater part (29.3%) of the hospitality organizations that do track social media metrics once a week, a 43.9% do not have a social media strategy. Also, more than a half of those tracking metrics once a month did not implement a social media strategy. But among those having implemented any kind of social media strategy or marketing plan, both formal, informal or in progress (250 companies out 584 using social media) only a 20% do measure the impact of their activity on the net, every day. The majority of the "strategic" businesses do track metrics once a week (38.4%).

Anyway, when we asked the hospitality managers whether they noticed some enhancements in their business due to its promotion on social media, no one of them answered that they had no advantages. They quite unanimously (87%) answered that a wider visibility was one of the positive effects of the business promotion along with the higher number of reservations (60%), an increase of the reputation (48.8%) and of the leads, among others (Fig. 3.25).

Fig. 3.25 Fields of business enhancement due to promotion on social media [80]



[80] Other options like: higher occupancy rate, higher incomes, occupancy rate, tourist flows deseasonalization, etc. have not been included in the Graphic, in order to make it easier to read, since the results were lower than 5%. Percentages are calculated on the total of 584 hospitaly companies using social media.

The accomodation companies choosing at least 5 different fields of business enhancement (mainly visibility, leads, reservations, customer loyalty and new customers in this order of importance), due to the promotion on social media (the 46% of the enterprises using SM) have on average been using social media for 1 to 5 years. The 40.5% of them manage their presence on social media every day, another 43% once a week. The 67% have a Facebook account since at least 3 years or more. But only a 47% have implemented any kind of social media strategy.

The fact that the hospitality managers have a positive attitude towards the business promotion on social media should prove, at least, a little bit of awareness about the power and potentiality of social media marketing, but, as seen above, data on the frequency of use of social media tools and of measurement of the results do tell a different story.

Even going deeper into the social media measurement habits of the hospitality managers included in our sample, things do not seem to be more incouraging. When asking the type of metrics[81] the companies use to measure the impact of their activity on social media, it emerges that nearly all the businesses (98%) using metrics (cfr. Table 3.12 and Fig. 3.24), mainly check the input focused ones. Activity metrics measure the action the company takes on social media, i.e. the input the business is making into developing a digital and social presence such as the number, frequency and recency of posts and answers, the participation in communities or forums, etc.. Less hospitality enterprises (65%) track the Interaction Metrics, that focus on the customer experience, i.e. on how the target market engages with the company's digital and social presence (e.g. traffic, visitis, comments, reviews, likes, shares, click-throughs, registrations, subscriptions, virality, deal redemption rate, sentiment, etc.). These metrics normally show where an organization has gaps to fill

[81] A vast amount of different categorizations have been proposed by sholars and social media pratictioners or marketers about the type of metrics being relevant for a business. As said above (Note no.49), we embraced Tuten and Solomon's theory according to which metrics may be classified in three main types:

Activity Metrics - input focused, that measure the actions the company takes relative to Social Media (for instance, number, frequency and recency of posts);

Interaction Metrics - process focused, that focus on how the target market engages with the Social Media platforms and reviews (comments, reviews, deal redemption rate),

Return Metrics - outcome focused, measuring the outcomes (financial or otherwise) that directly or indirectly support the success of the company.

or opportunities to catch in order to deliver a great customer experience. Therefore, Interaction Metrics are maybe those that matter most for business success.

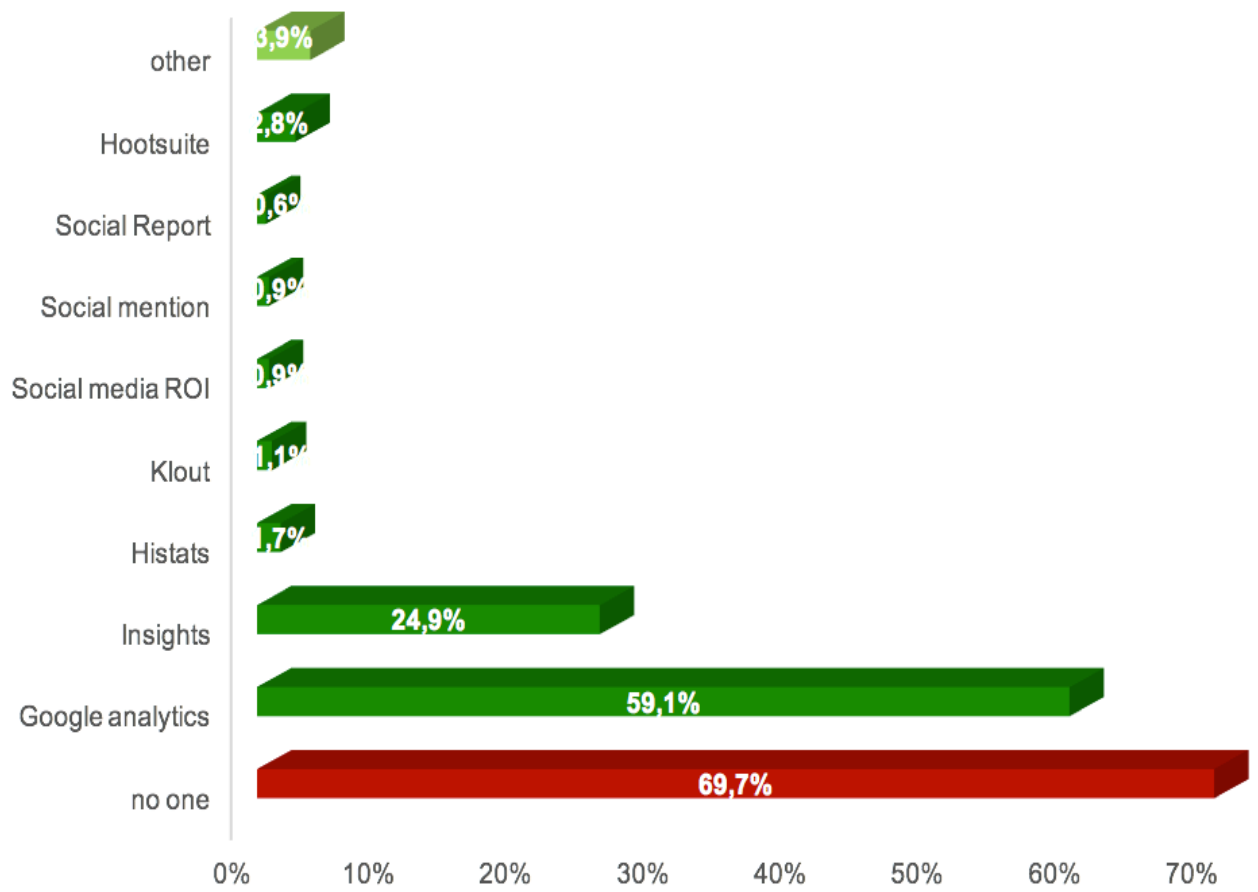
With regard to the Return Metrics, i.e. those focusing on the outcomes (financial or otherwise) that directly or indirectly support the success of the business (e.g. lead conversion rate, customer lifetime value, share of voice, return on investment, return on impressions, return on digital impact, return on earned media etc.), they are totally ignored by the 51% of the hospitality managers. The fact that Return Metrics are mainly disregarded by the hospitality managers, undoubtly expresses their lack of awareness about the usefulness of measuring the impact of their presence on social media.

Also, when asking which tools are used to measure the marketing performance on social media, among the most common ones available on the net, a 18.5% of the respondents tracking metrics, do admit to use none. Out of the more than 20 choices given as an answer[82], which intended to be the most common ones (both free of charge or to be paid), in a vast variety of metric tools still emerging new hospitality managers only chose 2. Indeed, they mainly just use Google Analytics (59% out of the 465 companies using metrics) and the social networking sites Insights (25%). In any case, they generally use only one of those tools (69% of the companies), wherease a small minority of the accomodation businesses (21%) use more than one tool (Fig. 3.26).

A major part of the companies (67%) using two or more tools to measure their performance on social media (98 out of 465) have implemented a strategy of any kind. Those using more than one metrics tool also invest in business promotion on social media (84%) although, only a small part (34%) invests more than 1,000€ a year for that purpose. They manage their presence on social media at least once a week (a 38% every day) and have a length of business in tourism and hospitality industry of more than 5 years (67%). They mainly are Hotels (51%) on a 2:1 ratio if compared to Bed and Breakfasts.

[82] The most common metric tools available on the net, bot free of charge or to be paid, have been given as choices for the answer: e.g. Google analytics, Insights, Histats, Sprout social, Hootsuite, Klout, Crowdbooster, Tweetdeck, Sumall, Twentyfeet, Cloze, SocialMention, TopicFlower, BlogMeter, TagBoard, SocialReport, ViralTag, Schedugram, social media ROI, etc.

Fig. 3. 26 Metrics tools used to measure the business performance on social media

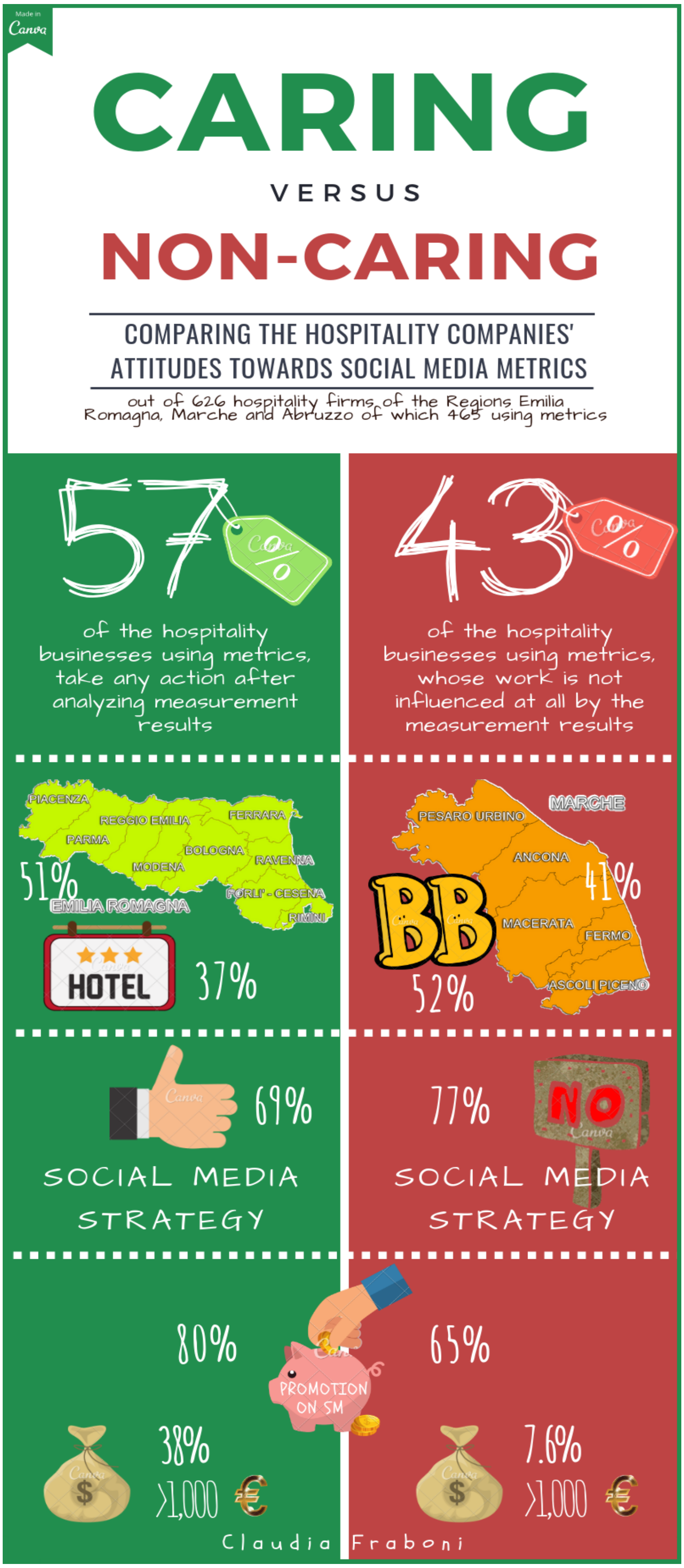


On the other hand, the hospitality businesses using no one of the metric tools listed in the question, although they claimed that hey measure the impact of their presence on social media (465 companies), are mainly Bed and Breakfasts (46.5%) on a 3:1 ratio if compared to Hotels. This opposite situation emerging from the comparison between those using the metric tools and those who do not, confirms that Hotels are more keen to measure the impact of their presence on social media than the other accomodation types.

The lack of awareness about the importance of controlling the metrics is also confirmed by the actions hospitality companies take or do not take after having analysed them. The 43.4% of the businesses using metrics (202 out of 465) admit that their work is not influenced at all by the measurement results. This is undoubtly a clear proof about the fact that a good part of the hospitality managers are a long way off from being aware of the importance of measuring the impacts of their activity on social media. In other words, nearly a half of the accomodation managers of the Medium Adriatic Coast in our sample do manage a presence on social media and to check metrics with a certain frequency, without caring about the results of the measurements, i.e. without taking them into account for future decisions or, where appropriate, to change their activity on social media in order to enhance the value of their offer. More than a half of those who do not care about the results of the measurements are Bed and Breakfasts (52%), followed by far by Hotels (16.5%) and Farm Houses (14%). These companies are mainly located in the Region Marche (41%) (a half of the "non-caring" B&Bs are from the Region Marche), fewer in Emila Romagna (36%) and Abruzzo (23%). A 43% of the "non-caring" accomodation companies manage their presence on social media once a week, a good 27% every day. They generally invest less than 1,000€ in the business promotion on social media (a 64.6% of the "non-caring" firms), but much fewer (26.8%) invest in training courses and mainly less than 1,000€. As we would expect, the 77% of the "non-caring" companies have not implemented any kind of social media strategy, not even a marketing plan (Cfr. Infographic "caring" versus "non-caring" hospitality companies).

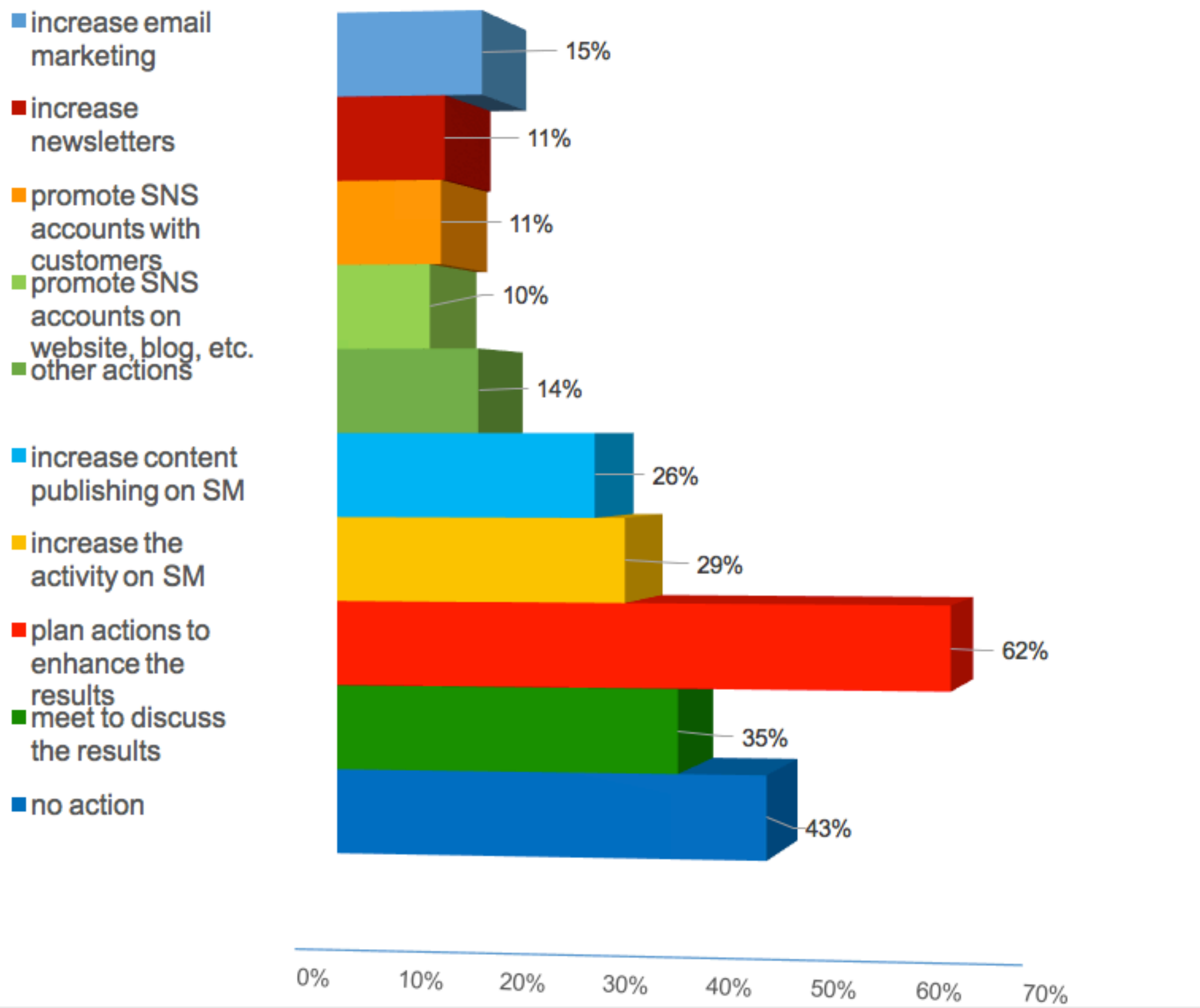
The "caring" hospitality organizations, i.e. those that are influenced by the results of the metrics and take actions accordingly, are, instead, a 56.6% of the firms that do use metrics (263 out of 465). These are preminently Hotels (37%) and more than a half of all the "caring" accomodation firms are located in the Region Emilia Romagna. The "caring" enterprises, unlike the "non-caring" ones, have implemented a social media strategy of any kind, formal, informal, still under way or a marketing plan (nearly a 70% of them). The 80% of these invest in business promotion on social media and a good 38% invest more than 1,000€ against the 7.6% of the "non-caring" hospitality companies. Also, a greater part of the "caring" firms (50%), if compared to those that ignore the results of metrics (26.8%), invests in training or refresher courses, although 89.4% of these invest less than 1,000€ a year. The 37% of the enterprises taking the social media metrics into account for future action or planning, do use social media every day, the 49% manage their presence only once a week (Cfr. Fig. 3.27).

Fig. 3. 27 "Caring" vs "Non-Caring" hospitality companies Infographic



With regard to the type of action the "caring" companies take, after having analyzed the results of the social media metrics, the 46% of the firms *plan actions to achieve better results,* as a first step. Another 33% of the accomodation enterprises *meet to discuss the results* as soon as they are available and a 14% *increases the presence on social media* as a first reaction. In general, the variety of actions most frequently taken (>25%) by hospitality managers after ananlyzing the metrics results is very low (Fig. 3.28).

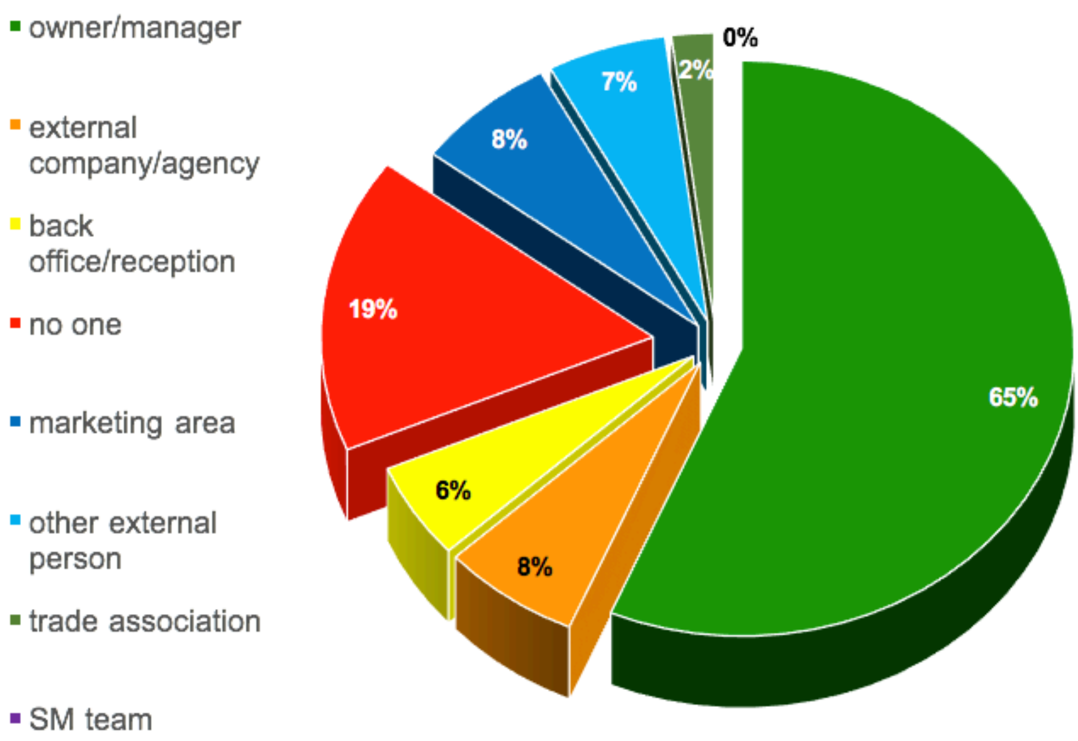
Fig. 3. 28 Actions taken after the metrics analysis[83]



[83] The percentage for 'no action' is rekoned on the total of accomodation firms using metrics, i.e. 465. The other options are calculated on the total firms taking action after analyzing the social media metrics, i.e. 263. Since the choice of multiple actions was possible the total is higher than 100%.

If it is true as Thomas (2009) stated, that the metric tools are only as good as the individual running them and that the real task lies in making sense of the information retrieved, it is important to understand who in the hospitality firms is in charge with controlling the social media metrics. Whether the metrics are analyzed by a social media or marketing practitioner/expert, both external or internal, would tell us about the importance the accomodation enterprises accord to measuring the impact of their activity on social media and indirectly to social media marketing itself. Well, metrics, as it is for the social media presence[84], are directly managed by the hospitality firms owner or general manager in the great majority of the cases (Fig. 3.29). A very small part of the organizations (8%) in our sample assign the task to the marketing area or to an external agency, no one to a social media team.

Fig. 3. 29 Who is in charge with the metrics measurement?



[84] Social media are mainly managed by the accommodation establishment's owner (72%) and more seldom tasked to an agency (8%) or to external social media professionals (3,7%).

The quite weird thing is that a 19% of the companies using metrics to measure the impact of their presence on social media, stated that *nobody* is concerned with controlling the metrics, although a good part of those admitted to check the metrics once a week (31.4%) or once a month (33%) and even daily (16%). Out of these 89 companies where no one is concerned with the task, although the task is fulfilled, more than a half (52%) are Bed and Breakfast mainly located in the Region Marche (49%).

Without surprise, inside the 79% of these companies, the person concerned with the social media activities management is the owner or general manager. Their presence on social media is daily granted in the 28% of the cases. Anyway only a 21% of these companies have implemented a social media strategy of any kind.

The fact that the respondent hospitality managers contradict themselves when answering to the questions concerning the third research question, may be an evidence of their lack of knowledge about the metrics themselves, their utility and the vast measuring possibilities the net offers. In any case it confirmes the more general lack of awareness about social media which is the focus of the first research question.

3.3 Conclusion

As it has been argued that the future of tourism will be ever more focused on consumer centric technologies that will support organizations in interacting with their customers dynamically (Buhalis & Law, 2008), this study provides useful insights into the tourism managers familiarity and use of ICTs and the implications to pursue in order to achieve such a goal.

Are tourism and hospitality managers ready to face the challenges resulting from the shift in distribution channels and the emergence of new media? In response to these changes, they need to understand the technological dynamics in order to better reach out and promote their businesses to online travelers.

3.3.1 Summary of the findings

The findings clearly show a great need, for the majority of the Medium Adriatic Italian hospitality managers to catch up on social media trends and on the new tourists need of interaction. In general we may speak of a shortcoming in digital transformation[85]. As a reason behind this, many results do suggest a general lack of awareness about the immense potential of social media and about its importance for the business success.

Companies in our sample generally use social media without having a plan, a strategy nor even a goal fixed and manage their presence too seldom to face those challenges, missing great part of the opportunities offered by social media. Of all the tools, tips and tricks offered to an organization to interact with their customers and to empower their business on social media, the italian Medium Adriatic hospitality managers just use a very minimum part. There is much more than Facebook on the net. And even on Facebook there is much more to do than just *check the accounts without posting.* Also, the fact that they invest very little in social media marketing and in social media training courses certainly reveals a low level of awareness about the opportunities offered by the consumer centric technologies. After all, the Medium Adriatic Italian hospitality managers generally disattend measuring the impacts of social media on their business and even when they do, it is not a foregone conclusion that they take action according to the metrics results. Maybe they do not know how to do, maybe they do not understand the need or maybe they do not want to give their business a boost. A different kind of research (possibly a neuromarketing study) would be needed to verify the reasons of their behaviour. In any case, at this stage of the ICTs advances there is no point to sit and observe things happen. It is time to ride the wave and catch up, but the Medium Adriatic hospitality companies seem not to have uncovered this new trend yet. There is no entrepreneurial culture to this end.

Recalling the three research questions[86] that have inspired this work, first of all the

[85] Digital transformation is the integration of digital technology into all areas of a business, fundamentally changing how to operate and deliver value to customers. It's also a cultural change that requires organizations to continually challenge the status quo, experiment, and get comfortable with failure. https://enterprisersproject.com/what-is-digital-transformation#q1

[86] The research questions (see page 6) are:

1. To what extent are hospitality managers using social media?
2. Do they have a social media marketing strategy?

level of familiarity with social media tools of the Medium Adriatic hospitality firms is not high, thus it does not translate into an efficient usage. They absolutely underuse social media. Furthermore, they invest very little in training courses which could, where appropriate, help enhancing their familiarity. This may be a first element to explain the entrepreneurs' general lack of awareness about the importance of social media for the success of hospitality businesses. As said repeatedly, tourism has been affected by the ICT revolution much more than other industries, since tourists use social media during every phase of the travel and are connected 24/7 asking for instant responses to fulfill their impelling needs. Well, the great part of the Medium Adriatic accomodation managers seem not to be aware of this, In fact, they generally manage their presence on social media only once a week and, as said, using a minor part of the existing tools and media.

The lack of awareness and familiarity with social media is confirmed by the findings referring to the second and third research question. Indeed, the majority of the accomodation companies are in the earliest stage of the social media marketing maturity, being still in an exploratory phase where they open accounts without having a plan or strategy of any kind, nor even any goals to consciously aim to with their social media activity. As a consequence, metrics are mainly ignored and in any case not influencing the social media behaviour of the firms.

Among all the different kind of lodging, Bed and Breakfasts, that are the smallest-scale type of accomodation, often outdistance the others, being the most social businesses. This result adds a new perspective and offers a contribution to the limited debate on MEs' usage of ICT, according to which micro-enterprises lag behind small enterprises regarding internet usage (Pascucci F. et al. 2017; Jones et al., 2014 among the more recent publications).

Being this the situation, it goes without saying that accomodation companies in the area of the Medium Adriatic Regions have a hard work to do to catch up with the emerging trend and, above all, to offer good value to tourists according to their newest needs and requirements.

In any case, it is important to underline that the competitive environment in which the Italian hospitality businesses play is moving very fast towards the digital transformation.

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3. Do they measure the impact of social media on their business?

Both the European Union and the Italian governement are boosting the economy digitalisation and the Broadband coverage with many actions[87] and the Italian corporate digitisation has grown fast in the past two years being aligned to other European countries (Cfr. Chapter 1). Even, according to the Europe's Digital Progress Report 2017[88] the Integration of Digital Technology in the Italian accomodation sector is a positive exception of higher digitisation than expected (if looking only at the countries and sectoral marginal averages). Thus, the situation observed among the hospitality managers of the Medium Adriatic Coast may not be so common and widespread allover Italy. This means that Hospitality companies have no more infrastructural or environmental obstacles to delay their digital transformation. It is all upon their will and awareness.

[87] The National Plan launched in 2016 by the Italian Ministry of Economic Development, known as "Industry 4.0." was a way to digitalise the Italian economy through technology research and innovation, tax breaks, and venture-capital support for startups. The plan includes funding at the top Italian universities that focus on innovation and high tech, as well as, partnerships with organisations in the United States such as Apple and Cisco, who see great potential in the Italian market. The Plan puts in place horizontal measures, i.e. adopting a technology neutrality approach, addressed to all types of enterprises, regardless of their size or sector, with the purpose to boost the investment in new technologies, research and development, and revamp the competitiveness of Italian companies. This is complemented by: an Ultra Broadband Plan, to improve connectivity. Available at: <http://www.mise.gov.it> [Accessed: 3 September 2018]
An important European strategy is the Digital Single Market which aims to open up digital opportunities for people and business and enhance Europe's position as a world leader in the digital economy. The main goals are: Shaping the Digital Single Market; Boosting European digital industry; Building a European data economy; Improving connectivity and access; Investing in network technologies; Advancing in digital science and infrastructures; Supporting media and digital culture; Creating a digital society and Strengthening trust and security Available at: <https://ec.europa.eu/digital-single-market/en> [Accessed: 3 September 2018]

[88] European Commission Europe's Digital Progress Report 2017 – Integration of Digital Technology

3.3.2 Managerial implications

The above discussed findings have allowed us to draw a picture of the Italian Medium Adriatic hospitality managers' knowledge (interest, acceptance, familiarity and awareness) about social media, to understand the state-of-play and evolution of their digital tansformation and accordingly, to detect and draw possible implications which could be of relevance for all the tourism and hospitality managers.Indeed, in view of the above results and considerations, there seems to be wide room for improvement for the surveyed hospitality firms both in the field of digital skills and digital transformation.

The main challenges appear to lie in the lacking of awareness, thus of digital skills. Therefore, the *first* suggestion to hospitality managers, that is connected to the results of the first research question, is to invest in social media training and refresher courses. This should be the starting point, the *conditio sine qua non* of social media marketing*.* The investment does not necessarily need to be in terms of money, but rather in terms of time spent. There is a huge variety of courses focused on digital skills on the net, lots of which are free of charge[89]. Also, many trade and tourism associations often organize refresher courses, so that there are countless different possibilities to attend free of charge or very low cost courses. The opportunity to attend training or refresher courses on social media should be given to all the employees inside the organization, even to those which are not directly concerned with the marketing area, business promotion or customer service[90]. Indeed, given that tourism is a consumer driven industry and that social media facilitate the interaction with these, digital skills are essential in every area of a tourism and hospitality business. Investing in digital skills would raise awareness about how social media are crucial to accomodation businesses and consequently raise interest and familiarity.

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[89] Free Online Courses in Digital Skills and MOOCs from top universities and colleges are available, for instance at: <https://www.class-central.com/tag/digital%20skills> and <https://www.futurelearn.com/courses> Also Google offers free online courses at: < https://learndigital.withgoogle.com/digitalgarage>

[90] Italy is quite below the European Countries average (ranking 22nd) as far as *businesses provinding training to their personnel* is concerned according to the Digital economy & society in the EU report. Available at: <https://ec.europa.eu/eurostat/cache/infographs/ict/2018/bloc-1c.html> [Accessed: September 2018]

All other shortcomings highlighted with the results and discussion about the first research question will fall right in line (e.g. managing a presence every day, using more tools and SNS accounts, etc.).

The *second* implication, resulting from the findings of the second research question, is that, every activity on social media should be following a strategic plan. A social media marketing strategy would help directing all the actions, even the most apparently worthless, to a unique and shared goal. When a strategy implementation is not possible because of a lack of skills or money to invest assigning the task to an external agency or pratictioner, than at least a social media editorial calendar connected to a shared goal (even if not written) should be useful. If all the persons working inside the organization are aware of the goals fixed and of how to aim to them, if there is a *fil rouge* to follow, every post, every single activity on social media will contribute to give a unique and uniform image of the organization and to create value for the customers. This is even more true for hospitality businesses where instant reactions to the tourist comments or requests of information should be assured. No matter what the goal may be, managing the presence on social media is vital to an accommodation business. Once a week may be too late, if a post published has had reactions or if a tourist has written a very bad review on the hospitality business services. To face the challenges resulting from the consumer centric technologies and from the dynamic, instant and real time interactions of the new tourists, an hospitality business should be reactive, fast and stay tuned 24/7. After all, mobile devices make it easier and possible even low budget.

The *third* suggestion to hospitality managers, according to the results of the third research question, is that measuring the impacts of a business activity on social media is crucial and no longer optional. *As data become a driver for understanding people's behavior on and offline and informing business decisions, aligning on the metrics that contribute to a business's bottom line is critical*[91]. Not only to measure the company's performance (Activity metrics and Return metrics) and to verify whether the goals fixed have been reached, but mainly to focus on customers (Interaction metrics). Each business has countless different

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[91]Smallwood B. (2016) Resisting the siren call of popular digital metrics," The Journal of Advertising (JAR) June 2016 (Vol. 56, Issue 2). Available at: <https://www.facebook.com/iq/articles/defining-the-metrics-that-matter> [Accessed: September 2018]

options available to focus on the consumer experience, through social listening, in order to gain deeper insights into consumer behaviour and preferences.

There are different possible levels of social media metrics analysis, from the most simple and costless to the more complicated and expensive. These options may be shown on a matrix (Table 3.13). A company may simply dedicate some time, possibly entrusting one person of the staff, to observe, on a constant basis, the customers interaction with the organization's social media activities (comments, likes, etc. to posts or content sharing on SNS, article publishing, etc.). Or the hospitality managers could use some of the many tools available on the internet, both free of charge or paid, to measure the Activity, Return and Interaction metrics. Nearly all search engines or social networking sites offer their specific metric tools or dashboards which generally provide free version features as well as a paid upgrade[92]. For instance, the amount of information a business can get from Facebook on the performance of its posts, audience demographics and campaign tracking is amazing. Facebook offers the most comprehensive metrics for business pages. Or else, an hospitality business may purchase a metric dashboard software[93] or even entrust the task to a social media agency or to an Information professional to get more complicated analysis and to assess the proper KPIs. Logically, different options of the matrix may be combined and implemented at once. Anyway, while having a huge amount of information available is nice and wow, it's only useful if a company understands which data matter the most to its business. Sometimes the measurement of an immense amount of data comes at the expense of what is actually important and it may be hard to determine which metrics are truly useful. Even if social media monitoring tool dashboards are making some tasks easier, to properly track, mine and analyze metrics and get the most of them, some skills are required. Therefore, if an hospitality business wants to deal with metric tracking and analysis with its own forces, it should, first of all, invest time and resources in training and refresher courses. Embracing the dynamic nature of information and periodically checking and challenging established wisdom to enhance measurement models with new data may be even more healthy for an organization. Then, also implementing a plan, strategy and/or calendar of metric tracking would be recommended, even better if integrated into a wider

[92] Some of the most used and complete analytics are: Facebook analytics; Twitter analytics; Twitter keyword report; Instagram management; Instagram analytics; LinkedIn company pages report and so on

[93] There are many dashboard software providers such as: www.zoho.com; www.looker.com; https://funnel.io; www.klipfolio.com; https://agencyanalytics.com; www.geckoboard.com; https://spinify.com and so on

social media plan, strategy or calendar. As seen, the three implications complete and complement each other, enhancing the overall effect when used together.

Table 3.13 Social Media Metrics analysis matrix

	COSTLESS	EXPENSIVE
SIMPLE	*CONSTANT OBSERVATION*	*METRICS DASHBOARD SOFTWARE*
COMPLICATED	*SNS ANALYTICS*	*SOCIAL MEDIA AGENCY or INFORMATION PROFESSIONAL*

Our elaboration

A further and final suggestion, in part linked to the measurement of results, may be that of keeping trace of all the information received about current or potential customers (identity, country of origin, preferences, etc.) to use them for implementing a Customer relationship management[94] or better said, a Social CRM[95]. The vast quantity of data made available by social media enable companies to derive insights about their customers and to

[94] Customer relationship management (CRM) is an approach to manage a company's interaction with current and potential customers. It uses data analysis about customers' history with a company (from a range of different communication channels, including a company's website, telephone, email, live chat, marketing materials, and social media) to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth. Source: <https://en.wikipedia.org/wiki/Customer_relationship_management> [Accessed: September 2018]

[95] While he traditional model of CRM assumes that customers are passive, responding to a company's actions primarily through their purchasing behavior, social media might affect CRM by allowing customers to become active participants in the relationship, by providing them with opportunities to engage with the firm. When a user generates content related to a specific brand, he or she is engaging with the company. Social CRM is conceptualized by Malthaus et al. (2013) as being composed of two dimensions: a CRM dimension and a social media dimension. The CRM dimension comprises the three basic components of the traditional CRM process: relationship initiation (acquisition), maintenance (retention), and termination.

act on them making decisions on the basis of evidence rather than rely solely on intuition (McAfee and Brynjolfsson, 2012). CRM allows a company to manage its relationships with customers in a systematic and proactive way as the approach is conceived to move from beginning (initiation) to end (termination), with execution across the various customer-facing contact channels. In particular, it facilitates customer information leveraging in order to maximize customer lifetime value. Data are considered a new class of economic asset (World Economic Forum 2012), it is certainly worth using them at best.

3.3.3 Limitations of the research

The *first* limitation to be underlined is directly related to the vast scale of social media, combined with its dynamic real-time nature. There are new social channels and tools popping up and big changes to current ones happening all the time. Therefore it impossible to treat the phenomenon comprehensively. So, rather than pretending to be exhaustive, we have chosen to pick a few issues where the main points can be presented in a simple manner. The so-called socratic paradox: *"I know that I know nothing"* fits the first limitation.

Second, and maybe one of the main limitations of this study, is the geographic coverage: the area considered by the research is only a sixth part of the entire Country. Even if the three regions involved may be, to a certain extent, representative of the northern (Emilia Romagna), central (Marche) and southern (Abruzzo) areas, thus representing the whole Nation, the east and west coasts of Italy present different peculiarities among the hospitality businesses. This, certainly does not allow the extension of the results to the overall Italian accomodation firms panorama, but may be a recommendation for future research.

Third, a quite significant limitation of the present work is the low variability of the sample. This is a kind of limitation which you cannot poperly expect when planning the research, but which may strongly affect the data analysis. In particular, no significant differences emeged in terms of size of the hospitality businesses (97% are micro-enterprises) which is given by the staff headcount and the yearly income variables. Likewise, other variables have shown a very low deviation and a catalysing effect towards only one or two categories (e.g. being part of a group, managing other businesses, etc.). This, resulted in the impossibility to use those variables for more complex statistical computation and analysis.

The *fourth* limitation of the study, which affected the data statistical elaboration, concerns the fact that many variables were categorical (nominal) ones and therefore did not allow complex statistical computations and analyses which assume that the variables have a specific level of measurement, such as linear regression, anova, etc. Anyway, deep descriptive and crossed-tabulations analysis have been carried out, as well as a logistic regression, that is an approach by which you get a regression equation that fits the categorical data. Other techniques fitting nominal variables, such as cluster analysis have been tried out but did not give satisfying results because of the low variability of the sample.

The limitations concerning the geographic coverage, the vastity of the phenomenon and the type of variables envisage a choice to be made during the research planning, which has necessarily to come to terms with the resources availability. Whereas the low variability limitation gives measure of the characteristics of the respondents and is a consequence of the investigation.

3.3.4 Recommendations for further research

The gathered data used in the present study could offer possibilities for more profound analyses. *First,* we have not fully utilized all the coded data, since variables were a lot and time limited.

Second, on the basis of the results of our study, future research efforts could be devoted more profoundly to the reasons behind the incoherence of some answers, i.e. on the lack of interest and/or awareness about the metrics tracking, for instance.

A goal of future research could also be the development of content analysis on social networking sites activity of the accommodation firms involved in this work. This will allow for additional comparisons and analysis on the familiarity and use of social media by the hospitality suppliers.

Also, an extension of the study to the hospitality companies of the Tirrenian coast or to cover the whole Italian territory would be desirable, firstly to compare the different Italian areas or regions and secondly to discover where the positive exceptions of higher digitisation observed by the Europe's Digital Progress Report 2017 are to be found in our Country.

Third, the gathered and coded data would allow more kinds of cross-tabulations either to reveal further potential research gaps or to analyze in-depth the managerial implications derived from.

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3.5 Appendix

Logistic Regression Code for R

```
# Import the dataset and arrange it a little bit
accomodation <- data.frame(accomodation)
str(accomodation)
mydata <- data.frame(sapply(accomodation, as.factor))
str(mydata)

# Explore the structure of the dataset
summary(mydata)

# Remove the observations with missing data
# create new dataset without missing data
newdata <- na.omit(mydata)
summary(newdata)
# This is the data set we will work with

# Create a logistic model to explain the existence of an social media
strategy
# A fist model with all variables
model <- glm(social_media_strategy ~ ., data = newdata, family =
"binomial")
summary(model)
# Only a small number of variables are statistically significant
predict <- predict(model, type = 'response')
table(newdata$social_media_strategy, predict > 0.5)
(264 + 149)/nrow(newdata)

# Use the "step" function to select the final variables
new_model <- step(model, direction = "backward")

# Keep the final model
summary(new_model)

exp(cbind(Odd_Ratio = coef(new_model), confint(new_model)))
warnings()

# Assess the performance of this model
# The baseline model
table(newdata$social_media_strategy)/nrow(newdata)
# The baseline model predicts the most likely event, in this case that
there is no social media strategy

# Model prediction
# Predict the model and find the probabilities
predict_model = predict(new_model, type="response")
# The confusion matrix; treshold = 0.5
table(newdata$social_media_strategy, predict_model >= 0.50)
# The performance:
(265 + 155)/nrow(newdata)
# It is 72%

# Assess the overall performance of the logistic model
install.packages('ROCR')
library(ROCR)
```

Chapter 4

SOCIAL MEDIA
in the
TOUR OPERATOR INDUSTRY
a
LITERATURE REVIEW

4. Abstract

Social media and ICT have significantly revolutionized the way in which business is conducted in the tourism and travel industry. In particular, ICTs have intoduced complexity to the distribution system with various permutations such as additional layers of intermediation or disintermediation when certain players bypass traditional intermediaries. Tour operators which are considered business to business players now may both deal with travel agencies or consumers directly. This resulted in greater choice for tourists and increased competition for distribution participants. Although there is an ever growing body of research on tourism and social media and some on the tourism distribution system, nearly no attention has been paied yet, to the role of social media for tour operators. In this chapter, the state-of-the-art of knowledge and discussion among scholars about the impact of social media on the tour operators and their use and perception of ICTs will be examined to find suggestions for future research. A systematic review process and a quantitative content analysis approach for the analysis of textual data were used.

The present work, as a literature review on tour operators and their relationship with social media adds an important building block to research on ICT and travel industry.

Keywords

Tourism, Travel, Tour operator, ICT, social media

4. List of Figures

4. List of Tables

4.1 Introduction

Travel and tourism is a fragmented, information-oriented industry, thus making it highly receptive to the benefits of the Information and Communication Technologies. In the last decades the IT advances and social media have significantly revolutionized the travel industry and the whole tourism value chain introducing new marketing and management tools and contributing to the rise of progressively larger number of intermediation layers, in spite of concurrent disintermediation and re-intermediation activity.

First with the rise of the online travel agencies (OTAs) then with the eMediaries (Expedia, Last minute) and Meta search travel sites (Kayak, Trivago, Tripadvisor) until the mobile location-based services, ICT have added additional channels of distribution, which shifted the power of booking towards the consumer (Scaglione et al. 2013) and brought to a higher complexity in the travel distribution channel.

In this scenario, tour operators have gained increasing power thanks to the opportunity to act both as B2B suppliers for travel agencies and as B2C suppliers selling directly to consumers. The higher complexity in the travel distribution channel poses both opportunities and challenges (e.g. higher competition) which, in any case, make the usage of social media absolutely crucial for tour operators.

While there is an ever growing body of research on social media and tourism, on the other hand, tour operators and their relationship with social media have received nearly no attention by scholars. Also, there is a general lack of research in the tourism B2B context (e.g. Sigala, 2007; Bigné et al., 2008). Researchers have focused mainly on disintermediation and re-intermediation processes fostered by the Web and on their implications for the organization of agencies and sales management (Ginanneschi, 2014). This suggests a gap in research, which will be addressed through this chapter.

The present study is to be set in the stream of the supply-oriented perspective analysis (Munar et al., 2013), since it deals with the challenges and the impact that social media represent for B2B Travel companies. And, according to the classification of Lu et al. (2017), this work may be set in the stream of literature analysing the Role and effects of social media, since its major topics are: social media adoption (use), the perception of ICT and the impact of social media on the tour operators.

4.2 Methodology

The present study provides a systematic review and commentary along the literature about the impact of social media on the tour operator Industry and their use and perception of it. A quantitative content analysis approach was used extensively in the analysis of textual data because of the online availability of review articles in social media literature.

As said in chapter 2, systematic reviews[96] differ from traditional narrative reviews since they involve the adoption of a scientific and transparent process, a detailed and comprehensive plan and search strategy derived a priori, with the goal of reducing bias by identifying, appraising, and synthesizing all relevant studies on a particular topic (Uman, 2011).

The process of literature review adopted in this work went through different phases (Fig. 4.1) which at the end brought to outline the evolution of the business and management literature dedicated to the impact of social media on the travel industry, to the usage of ICT by Tour Operators and their perception of it. In particular it led to establish to what extent existing research has progressed towards clarifying our topic and identify relations, contradictions, gaps, and inconsistencies in the literature that finally allowed to describe directions for future research.

A systematic review generally starts with the SCOPING of the literature. This stage is indeed needed to find out what was done before and what might make a new, important and interesting scientific contribution to the literature. After some search, the review questions were formulated according to the chosen field of interest. The first scoping also clarified whether the planned systematic review had already been done by other researchers.

[96] A review of a clearly formulated question that uses systematic and explicit methods to identify, select, and critically appraise relevant research, and to collect and analyse data from the studies that are included in the review. <https://pdfs.semanticscholar.org/2214/2c9cb17b4baab118767e497c93806d741461.pdf> [Accessed may 2017]

Fig. 4. 1 Systematic Literature review process

The review process then continues with the PLANNING phase, At this stage of the process the research questions were broken down into individual concepts to create search terms which then helped finding as many potentially relevant articles as possible to include. The aim of this work is, indeed, to be exhaustive and therefore representative of all studies that have been conducted on the topic of interest, still being fully aware that it is very difficult to be up to date when it comes to social media. In the balance between sensitivity (finding as many articles as possible that may be relevant) and specificity (making sure those articles are indeed relevant), at this stage, I wanted search terms to be more on the side of sensitivity so that I could trust I was not missing anything. Since the extant literature about social media and tour operator turned out to be very scarce, at this stage of the systematic review I decided to enlarge the selection criteria initially formulated on the base of my knowledge of the literature, to included more keywords, more subject areas and more types of publication. In a few words, instead of setting boundaries to limit the number of articles, as I needed to do in chapter 2, this time I had to extend and enlarge the domain of the literature review.

The third step of a systematic review, normally is the SEARCHING stage. The aim, in this case, is to find all available published or unpublished work which could address the research questions set through the chosen search terms. As, Tranfield et al. (2003) contended, searches in a systematic review, should not only be conducted in published journals and listed in bibliographic databases, but also comprise unpublished studies, conference proceedings, industry trials, the Internet and even personal requests to known investigators (Tranfield et al., 2003). As said above, being the attention paied by scholars to this topic so minimal, it was important to search in all types of academic work in the attempt to produce the most exhaustive review as possible.

The stage to follow is the SCREENING of all work identified by the search stage. This means reading the title and/or abstract of all studies and choosing those which meet the inclusion criteria and are potentially eligible for inclusion. For all the work selected at this stage the full-text version was obtained on the web. This first locating and sifting process continued to err on the side of sensitivity.

Finally in the ELIGIBILITY stage I sifted the full-text version of all potentially eligible articles and extracted relevant information to be included. At this point my focus shifted from sensitivity to specificity, making sure that potentially eligible studies were indeed relevant and appropriate for inclusion.

Once all the the publications considered as being relevant were included for the review, a preliminary coding sheet was prepared to evaluate each article along the following dimensions: year of publication, published journals and research area, authorship trend, type of publication, research methodology and study design and social media topics. Most of the evaluation criteria were developed based on previous meta-analysis in the field of hospitality and tourism management (e.g. Li, 2014). With regard to research methodology and design, two major types of research methodologies (i.e. non-experimental and experimental) were used to categorize articles (Salkind, 2005).

4.2.1 Research questions

The result of the SCOPING stage of the systematic literature review process (see Fig. 4. 1), brought to the formulation of research questions. In this phase, preliminary scoping of the literature was needed, first of all to understand the state-of-the-art of knowledge and discussion among scholars and pratictioners about the impact of social media on the Travel industry. Secondly to find a guiding principle to the topic of interest.

According to the knowledge I got at this stage, and in order to ensure an ongoing process with the previous review research on the hospitality industry (chapter 2), the following research questions were formulated:

- Do Tour Operators use social media?
- Which is their perception of social media?
- Which is the impact of social media on the Tour operators?

The first research question has been fixed to understand whether Tour Operators are considering at all to use social media or if they are already using it and to which extent. The aim is to find all previous literature on this topic in order to assess the knowledge among scholars and, if it is the case, identify gaps and suggestions for further research.

The second question, which is complementary to the first one, is all about the knowledge and the awareness[97] about the importance of social media as a key to success of the Travel companies. What matters for the purpose of this study is to understand whether the Tour Operators are in line with the paradigms shift[98] in communication and in intermediation and the challenges it brings with it. In other words, the aim of the second research question is to find out whether Tour Operators are interested at all in riding the wave and have the tools (knowledge, awareness, familiarity) to cope with it.

Finally, the aim of the third question is to find previous literature about the impact of social media on the travel industry and try to organize the existing knowledge and discussion among scholars into main streams. This question focuses, in particular, on the return of the investment, in terms of time and/or money spent, for the use of social media or for social media marketing implementation. The impact may be both financial or non-financial, thus, concerning immaterial aspects such as the company's reputation, its visibility and so on. At this stage of the literature review process, after some scoping of the existing publications on social media in the Travel Industry, I had the possibility to establish that no systematic reviews focusing the same topics already existed as at 2018.

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[97] According to the Oxford dictionary, Awareness *is the concern about and well-informed interest in a particular situation or development*. This means there must be concern and will to understand a matter, to tell there is awareness of it.

[98] "A paradigm shift, a concept identified by the American physicist and philosopher Thomas Kuhn, is a fundamental change in the basic concepts and experimental practices of a scientific discipline. Kuhn contrasts paradigm shifts, which characterize a scientific revolution, to the activity of normal science, which he describes as scientific work done within a prevailing framework (or paradigm). In this context, the word "paradigm" is used in its original Greek meaning, as "example"". Source <https://en.wikipedia.org/wiki/Paradigm_shift> [Accessed: October 2017]

4.2.2 Selection Criteria

In the planning stage (Fig. 4. 1), as anticipated above, the research questions were broken down into individual concepts to create search terms to be used to select articles. At this stage all the Selection or Eligibility criteria were defined. The Selection criteria encompass both inclusion and exclusion criteria. The first ones are those elements of an article that must be present in order for it to be eligible for inclusion in a literature review. The latters are the elements of an article that disqualify the study from inclusion in a literature review. In order to find as much as possible publications on this topic, which turned out to be insufficiently studied, the inclusion and exclusion criteria needed to be detailed (Lipsey and Wilson, 2001).

As for the Inclusion Criteria (Table 4.1) I first set the timespan. The choice to search among literature produced in the period from 2008 to 2018 was justified on the grounds that the most up-to-date literature review possible, covering a decade of studies was intended to be obtained. Expanding the time period to include publications beyond 2008 would have been useless since nearly no production was registered before that year.

Regarding the search key words, from a first scoping of the existing literature it emerged that the terms Tour Operator and Travel Company or Travel Industry are often used as synonyms. Since I got very few articles from the first search in the databases, I tried to expand as much as possible the possibility of getting more studies on the topic, including more synonyms as selection criteria. Also, I found that very often ICT and social media are used as equivalent words, although ICT stands for the wider category of Information and Communication Technologies which also include social media. Boolean logic search operators AND (a search for all of my search terms) and OR (a search for at least one of my search terms) were used to connect and define the relationship between the search terms Tour Operator; Travel company; Travel industry and ICT or social media. An asterisk was used at the end of the key words Tour Operator* and Travel compan* to expand the results to all terms having the same root word.

To decide the subject areas, I first sifted all the possible outputs for each area proposed by the databases and excluded all those which had absolutely no relevance to the research questions. Then, I included all those concerning the business management and the managers' behaviour and also added social sciences, computer sciences and interdisciplinary subject areas, with the hope to increase the chances to get as many publications as possible to include in the review (Table 4. 1). Since the search retrieved very few publications anyway, at the end, I decided not to put boundaries on the subject area opening to all possibilities.

Table 4. 1 Inclusion criteria

Primary key words	**Boolean**	**Secondary key words**	**Time frame**	**Doc type**	**Subject area**	**Databases**
"Tour Operator*"		Social Media				Scopus
OR						
"Travel Compan*"	AND	OR	2008 - 2018	All	All	Web of Science
OR						
"Travel Industry"		ICT				IFITT

The choice of the databases, came, as for the other inclusion criteria, after some scoping of the existing literature and after a lot of search on different databases or search engines. The best options to avoid duplication and to find as many articles as possible that may be relevant turned out to be Scopus and Web of Science as the main bibliogaphic databases. In addition, since a systematic review should not only be conducted in published journals and listed in bibliographic databases, but also comprise unpublished studies, conference proceedings, etc. (Tranfield et al., 2003), I searched the proceedings database of IFITT. The International Federation for Information Technologies and Travel & Tourism (IFITT) is the leading independent global community for the discussion, exchange and development of knowledge about the use and impact of new information and communication technologies (ICT) in the travel and tourism industry[99]. At present the

[99] Source: < https://www.ifitt.org/meet-ifitt/> [Accessed on April 2017]

ENTER conference, yearly organised by IFITT, and the IFITT community provide such an important and worldwide eTourism knowledge hub that a literature review would not be exhaustive without taking their publications into consideration. To be allowed to access and download the ENTER conference proceedings or articles published by SpringerLink[100] a membership to the IFITT, including the payment of an annual fee, is needed.

The **Exclusion criteria** concerned, first of all the date. As said above, since basically no attention was paied by scholars on social media and Travel industry issues before the year 2008, the timespan was limited to a decade. Another exclusion criteria concerns the language. For a question of time sparing I would have excluded all work published in other languages than those I know (English, French, German, Dutch, Spanish and Italian). Albeit the most used language in Academia is English, two articles in Spanish and one in Portugues were found, but still quite easy to understand.

The major exclusion criterion relates to the field of interest of the review research. All studies focusing on travel agencies, which are part of the travel industry but are business to consumer companies, have not been included. However many articles focusing on travel agencies have been screened with the hope to find some important feature about the use of social media in the relationship with the suppliers TO. Also, all work related to Airlines has not been included, since there again, social media are mainly used in their business to consumer part of the business, while the core issue of this review is the use of social media in the business to business sector of the tourism value chain. I granted careful consideration though, to all those studies, found in the literature sifting, that were 'near misses' or 'borderline cases', i.e. papers that could be almost equally argued for inclusion or exclusion.

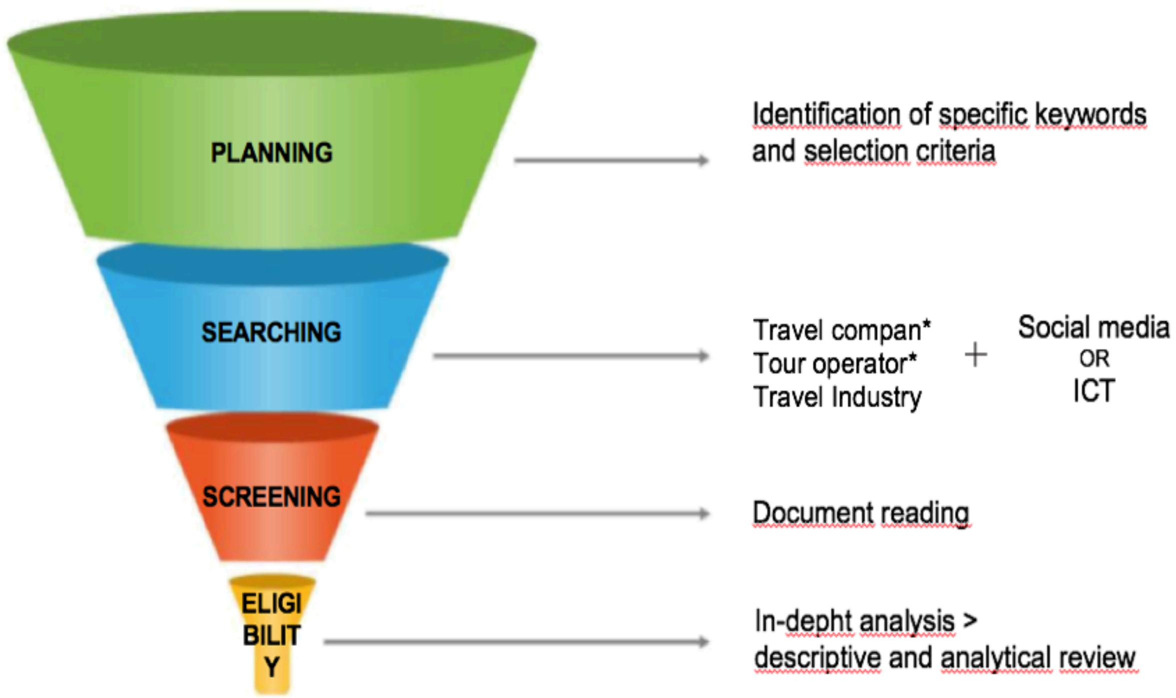
4.3 Literature review

Once that the five stages illustrated in the methodology (Fig. 2.2) have been accomplished, all the potentially eligible work remained and all the relevant information to be included in the review was extracted. In particular, after the SEARCHING process, I located all available studies which could address the research questions and began sifting

[100] Source: < https://link.springer.com>

literature to find all articles potentially eligible for inclusion. Articles on social media usage by Travel companies or on its impact, were identified and gathered from three of the largest and most popular online databases (Scopus, Web of Science and IFITT). From the simple search by keywords, I found a total of 127 publications of which the abstracts and/or titles were read in order to decide which to exclude and which to keep since useful and relevant to the research questions. After the SCREENING process, approximately one fourth (34) of all articles remained (Fig. 2.4). Of all the publications that were considered eligible for inclusion I read the full text (ELIGIBILITY process) and excluded 19 articles because focusing preminently on Destination Management, Travel agencies and airlines or because concerning tourism industry as a whole with no possibility to extract specific information on tour operators. I found two additional publications focusing on the travel industry and social media by reading the 34 articles and finally, extracted the relevant information from 17 publications.

Fig. 4. 2 Literature review process



4.3.2 Descriptive Literature review

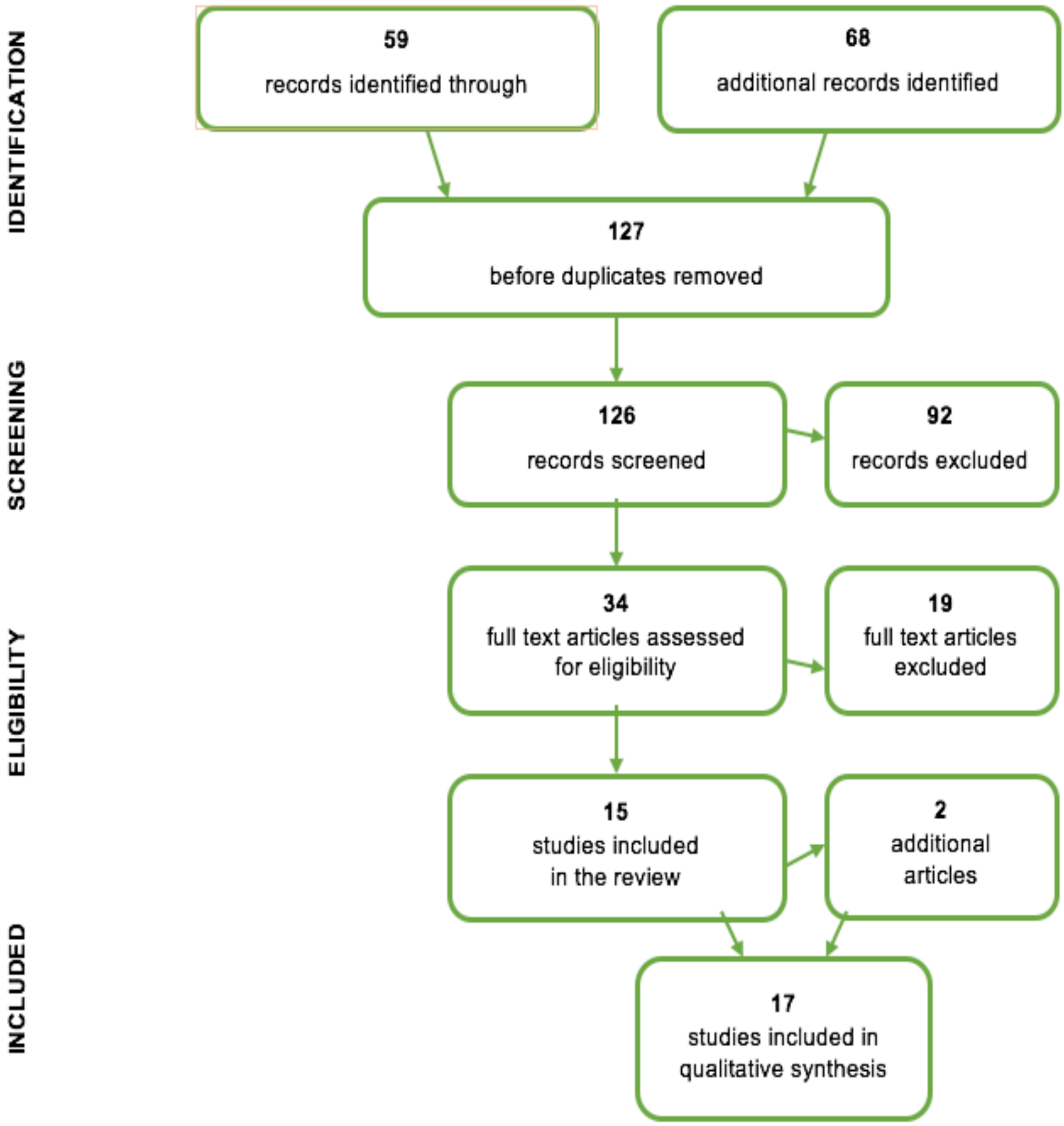
As a result of the searching stage a total of 29 publications were located in the Scopus database and another 30 articles from Web of Science (Table 2.2). Two additional papers were found from other sources. The IFITT database returned 68 studies, which is more than twice the number of each of the other archives. The IFITT database, which is accessible only for members having payed the annual fee, contains tourism and technology publications including ENTER eTourism Conference proceedings. Unfortunately the database platform (SpringerLink) has many limits that make the sifting procedure much more time-consuming. For instance, it is not possible to refine the search choosing more than one discipline or content type, nor language etc., therefore I had to check the work published in every single discipline, one by one and to check each single proceedings book per each year from 2008 to present. Also, the site does not offer many other usefool tools such as the possibility to save the search or to analyse the list of findings by year etc., so I had to do additional calculations.

Table 4. 2 Searching stage results

Year	SCOPUS	WEB of SCIENCE	IFITT	TOT	percentage %	growth compared with previous year
2008	0	1	4	5	4%	-
2009	2	0	4	6	5%	20%
2010	0	0	3	3	2%	-50%
2011	1	0	6	7	6%	133%
2012	4	1	0	5	4%	-29%
2013	4	3	6	13	10%	160%
2014	3	1	7	11	9%	-15%
2015	5	8	14	27	21%	145%
2016	8	7	11	26	20%	-4%
2017	2	6	9	17	13%	-35%
2018	0	3	4	7	6%	-
Total	29	30	68	127	100	

After the reading of all abstracts and/or titles, i.e. after the Screening process, a total of only 34 articles remained. For all the 34 remaining articles a copy of the full text version was acquired from various online sources (Fig. 2.4). From all the full text articles assessed for eligibility a part was excluded (19 articles) since were found to be not matching the research questions. The main reasons for article exclusion in the screening phase was the fact that focus was set on travel agencies, airline companies, tourist destinations and destination management organisations (DMO). Only one duplicate article was found. Finally, two more publications have been added, that were not located by the first keyword search, but were cited in the potentially eligible studies. The 17 publications left, have been included in the qualitative synthesis focusing on the use and perception of social media by travel companies, and on the impact of ICT on the industry (Fig. 2.4).

Fig. 4. 3 PRISMA Flow diagram 2009[101]



[101] PRISMA is an evidence-based minimum set of items for reporting in systematic reviews. Source < http://www.prisma-statement.org > [Accessed: September 2018]

If the initial number of articles located in the research stage, once the duplicates have been excluded, was already low (126), much fewer publications returned to be dealing with the research questions issues and to be eligible for inclusion in the review (13%).

4.3.2.1 Year of publication

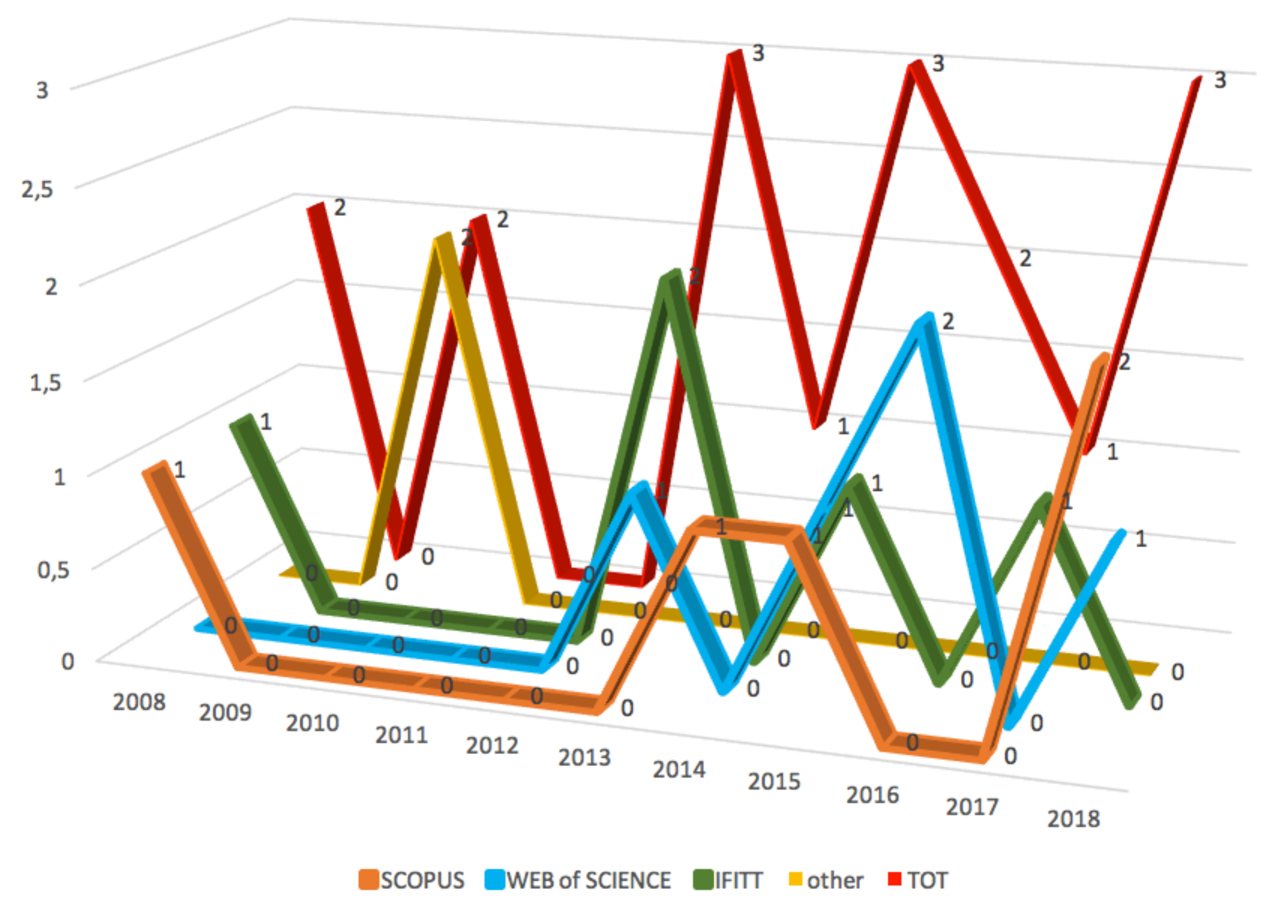
The use and perception of social media by the travel suppliers and the impact of it on the industry are very recent topics in academia. However, the attention paied by scholars on travel industry and its relationship with social media is still insufficient.

It is even difficult to discern a trend, considering that only 17 studies have been retreived as being published in the ten years considered as a timespan (Table 4.1). Less than two articles per year (precisely 1.5) have been produced on these topics, if we consider the whole time frame (11 years). But, if we only take the years in which there has been production on this topic into consideration, than 2.4 articles each year have been published.

Table 4. 3 articles included in the qualitative synthesis

Year	SCOPUS	WEB of SCIENCE	IFITT	other	TOT	percentage %
2008	1	0	1	0	2	12%
2009	0	0	0	0	0	0%
2010	0	0	0	2	2	12%
2011	0	0	0	0	0	0%
2012	0	0	0	0	0	0%
2013	0	1	2	0	3	18%
2014	1	0	0	0	1	6%
2015	1	1	1	0	3	18%
2016	0	2	0	0	2	12%
2017	0	0	1	0	1	6%
2018	2	1	0	0	3	18%
Total	5	5	5	2	17	100%

Fig. 4. 4 Year of publication per database



However, the academic production on these topics has had up-and-downs (Fig. 4.4) since the year 2008 with no noticeable trend.

4.3.2.2 Journals and research areas

Publications eligible to be included in the review where located in a total of 9 Journals and some proceedings books including the ENTER proceedings publication *Information and Communication Technologies in Tourism* (Table 4.4). All other articles that have been published as conference proceedings have been classified in the table 4.4 under the category *Other conference proceedings.*

Table 4. 4 Number of publications per Journal[102]

No	OA		JOURNAL	IF SJR	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	TOT	%
1			INFORMATION AND COMMUNICATION TECHNOLOGIES IN TOURISM ENTER Proceedings		1					2		1		1		5	29%
2			OTHER CONFERENCE PROCEEDINGS		1							1			1	3	18%
3	OA	US	Journal of Travel and Tourism Marketing	1.975 0.940						1						1	6%
4		US	Advanced Science Letters	SJR 0.13								1				1	6%
5		UK	Tourism Management	5.921 3.027			1									1	6%
6		D	Libri	0.500 0.243									1			1	6%
7	OA	UK	Journal of Sustainable Tourism	3.329 1.543									1			1	6%
8	OA	UK	Journal of Hospitality and Tourism Technology	SJR 0.520			1									1	6%
9	OA	Africa	South African Journal of Information Management	no index											1	1	6%
10		S	Journal of Intelligence Studies in Business	SJR 0.293											1	1	6%
11	OA	UK	Journal of Business and Industrial Marketing	1.833 0.652							1					1	6%
			TOT		**2**	**0**	**2**	**0**	**0**	**3**	**1**	**3**	**2**	**1**	**3**	**17**	**100%**

[102] **OA** - Open access refers to research outputs which are distributed online and free of cost or other barriers and possibly with the addition of a Creative Commons license to promote reuse. Open access can be applied to all forms of published research output, including peer-reviewed and non peer-reviewed academic journal articles, conference papers, theses, book chapters, and monographs Source: <www.wikipedia.com>
IF - The impact factor of an academic journal is a measure reflecting the yearly average number of citations to recent articles published in that journal. It is frequently used as a proxy for the relative importance of a journal within its field; journals with higher impact factors are often deemed to be more important than those with lower ones. Impact factors are calculated yearly starting from 1975 for journals listed in the *Journal Citation Reports*. Source: < https://jcr.incites.thomsonreuters.com> [Accessed: September 2018]
SJR - Developed by SCImago from the widely known algorithm Google PageRank™, the Scimago Journal Ranking (SJR) indicator shows the visibility of the journals contained in the Scopus® database from 1996. Source: <https://www.scimagojr.com/journalrank.php> [Accessed: September 2018]

Table 4.4 above, also shows, for each journal that is indexed, the Impact Factor and the Scimago Journal Ranking as at the year 2017. Most of the Journals (five out of the total of nine) are open source. The indexes are mainly based on citations and offer a measure of the visibility of a journal, therefore they are often used as proxies for the relative importance of a journal within its field. While the SJR ranks journals contained in the Scopus database, the Impact Factor ranking is edited by Thomson Reuters, thus connected to Web of Science.

None of the journals has published more than one article on social media and travel companies in the last decade. Among the journals, only four (40%) are in the domain of hospitality and tourism, and the remaining are in the fields of marketing, business and management, social sciences and information sciences and technology, decision sciences, and information science (Table 4. 5). As said above, in this review I had to enlarge the boundaries of the research areas to try and find more studies focusing on the topics, since very few publications have been retrieved from the systematic review process. Therefore, a few areas that are closer to the information technology than to the business management, fall in the listing below.

Table 4. 5 Research Area

	SCOPUS	WOS	IFITT	OTHER	TOT
TOURISM ICT			5		5
BUSINESS MANAGEMENT AND ACCOUNTING	2			1	3
INFORMATION SCIENCE LIBRARY SCIENCE		2			2
SOCIAL SCIENCES		2			2
SCIENCE TECHNOLOGY		1		1	2
DECISION SCIENCES	2				2
COMPUTER SCIENCES	1				1
TOT	5	5	5	2	17

Tourism and ICT is the largest category, among the research areas, under which the articles were published. This result is influenced by the fact that all proceedings papers retrieved from the IFITT database have been classified in the tourism and ICT area although they may also have been listed among the business and management area or any other as a secondary research area.

4.3.2.3 Authorship trend

Considering the very low number of studies being eligible to be included in the review research, the list of authors is equally not so varied. Only 6 authors have indeed, published more than one article, in the timespan from 2008 to 2018. Out of the authors' list in Table 4.6, Fuza, Isa and Ismail co-authored the same two publications and Moliner-Velazquez and Gil-Saura, equally, worked on the same papers. Except for the three malaysian scholars, the other authors are European (Italy and Spain).

Table 4. 6 Authorship trends[103]

No	AUTHOR	TOT	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
1	Baggio	2						1					1
2	Fuza, Z. I. M.	2			1	1							
3	Isa, S. M.	2			1	1							
4	Ismail, H. N.	2			1	1							
5	Moliner-Velazquez, B	2					1				1		
6	Gil-Saura, I.	2					1				1		

For the authorship, as for the other dimension, it is impossible to identify a trend, being the articles so few.

103 Only the authors who published more than one paper are listed in the table

4.3.2.4 Geography

The geography dimension refers to the countries of residence of the authors and institutions, in this case, the country of origin of the publications focusing on the impact of social media on the tour suppliers and their use and perception of ICT. The most recurrent country is Spain (Table 4.7), scoring the highest number of articles published from 2008 to present (4). Italy and Malaysia follow close behind, whereas all other countries register only one publication on the topic in the last decade.

Table 4. 7 Publications by Country

COUNTRY	SCOPUS	WOS	IFITT	OTHER	TOT	%
Spain	1		1	2	4	21%
Italy			2		2	11%
Malaysia	1	1			2	11%
United States				1	1	5%
Taiwan			1		1	5%
Greece			1		1	5%
Belgium		1			1	5%
Switzerland			1		1	5%
Finland	1				1	5%
South Africa		1			1	5%
Indonesia	1				1	5%
Etiopia		1			1	5%
Australia		1			1	5%
Portugal	1				1	5%
	5	5	6	3	19	100%

No articles among those eligible for inclusion, turned out to be stemming from the People Republic of China, nor from Hong Kong and only one, indirectly, from the United States. And yet, these are the countries that are driving the train for the academic literature production on social media in the hospitality industry. From this, it might be deduced that the issue about social media and tour operators is still a tiny niche in the literature stream, which has not caught the attention of scholars, yet. As we will see futher on in this study, further research is certainly recommended to expand the issue both in its depth and breadth.

In a few co-authored articles scholars from different countries of origin and universities of affiliation cooperated. That is the reason why the total in Table 4.7 is higher than the number of publications included in the review.

The language of all the publications but one is English. One article is written in Portoguese, which being similar to spanish is still quite easy to understand for me. Anyway, in the first searching stage I found more articles written in languages other than English. Although English is by now the most broadly used language in academic research, I located a couple of atricles written in Spanish and one in Portoguese.

4.3.2.5 Type of publication

With regard to the type of publications, I mainly located articles published in Journals, for the major part in the domain of tourism and ICT (see Table 4.5 Research Area). Only one of the studies was a literature review. Since it was a proceeding paper it was checked off twice in Table 4.8, hence, the sum of the publications is higher than the number of the eligible studies. A total of 17 articles, which corresponds to the 13% of all the publications located with the first search, have been included in the present review.

Table 4. 8 Type of publications

	SCOPUS	WOS	IFITT	other	TOT	%
ARTICLE	2	4	0	2	8	44.4%
PROCEEDING PAPER	3	1	5	0	9	50%
REVIEW	1	0	0	0	1	5.6%
TOT	6	5	5	2	18	100%

For the reasons explained above, ENTER Conference Proceedings database (SpringerLink) is one of the sources used for the review reasearch, hence, a good part of the publications are proceeding papers (9). The major part of these were precisely found in the IFITT database (5), then three additional conference papers were located with Scopus and one with Web of Science, for a total of 50% of the publications in the review coming from Conference Proceedings.

4.3.2.6 Methodology and design

Since the Ten different methods were employed in previous research. The most used study method is the online survey (Table 4.9) which is used in 10 articles on a total of 17 (59%). Many of the analysed articles used more than one study method including a two or three stages research method. That is the reason why the total sum of the study methods used is higher than the number of publications included in the review research. Considering the total number we get multiplying the number of articles per the number of methods used (28), survey as a study method is used in the 36% of the researches.

Case studies are also widely used and in most of the researches the multiple case study method is preferred. This method is nearly always combined with surveying or interviewing.

Table 4. 9 Methodology

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	Total	%
Content analysis						1		1				2	7%
Survey	1		2			2	1		1		3	10	36%
Case study	1		1						2	1	1	6	21%
Literature review											1	1	4%
Experiment										1		1	4%
Secondary data									1			1	4%
focus groups						1						1	4%
online data observation						1			1			2	7%
netnography									1			1	4%
Interview								1	1	1		3	11%
	2	0	3	0	0	5	1	2	7	3	5	28	100%

Note: Some publications used multiple resarch methods

Concerning the research design methods, none of the studies used the experimental design, thus the non-experimental design has been observed in the 100% of the publications. Among this wider category, qualitative methods are the most used (in 7 studies) but more or less equal to the quantitative methods (Table 4.10).

Table 4. 10 Research methods

Design Method	Count	%
EXPERIMENTAL DESIGN	0	0%
	0	
NON-EXPERIMENTAL DESIGN	17	100%
QUALITATIVE METHODS	7	41%
QUANTITATIVE METHODS	6	35%
MIXED METHODS	4	24%
TOTAL	17	100%

The research on the impact of Social media on travel suppliers and their use and peception of it remains still at its embryonic stage with only 17 articles published during the review period (11 years). As said above, it is still a very tiny niche, far apart from the literature mainstream.

4.3.3 Analytical Literature review

The limited number of publications located by the systematic review of literature made it difficult to describe some trends along the dimensions considered above. With the in-depth analysis of the full texts an attempt to trace some streams of literature on the topics will be made.

First, it is important to define the wider research context. The present study is to be set in the stream of the supply-oriented perspective analysis (Munar et al., 2013), since it deals with the challenges and the impact that social media represent for B2B Travel companies. And, agreeing with the classification presented by Lu et al. (2017), this work may be set in the stream of literature analysing the Role and effects of social media, since its major topics are: social media adoption (use), the perception of ICT and the impact of social media on the tour operators.

While there is an ever growing body of research on social media and tourism, most of the existing studies focus on the role and use of social media in travel information (Xiang & Gretzel, 2010: Ayeh et al. 2012) or on the consumer behaviour (Buhalis D., Law R., 2008; Ying T. et al., 2017). On the other hand, tour operators and their relationship with social media have received nearly no attention. Also, there is a general lack of research in the tourism B2B context (e.g. Sigala, 2007; Bigné et al., 2008) and on the impact of internet on B2B relations.

According to Reino (2013) B2B2C distribution in travel industry has been extensively researched and developed with regard to web services. The literature outlines examples of solutions, which in the last 15 years have helped overcoming technical issues related to Online Distribution. This includes reference to DMSs (Rita, 2000); standardisation in tourism (Missikoff et al., 2003); and B2B2C applications (Liu, 2005). However, though the benefits and impacts of Internet fostered 'e-transformation', 'dis-intermediation' and 'reintermediation' have been widely discussed within the generic literature (Reino et al., 2013; Malone, Yates & Benjamin, 1987), as well as the B2C tourism literature (Sigala, 2003), their impact in the B2B inter-firm relations in the tourism distribution chain have received little attention. Andreu, Aldás, Bigné and Mattila (2010) confirm that little attention has been paid to how managers of retail travel agencies perceive the consequences of adopting Information Technology (IT) in their relationships with their suppliers. They cite a study on tourism supply chain management in which Zhang et al. (2009) state that ''although a few tourism studies have addressed supply management issues, these studies are scattered and lack a clear focus'' (p. 5).

With the following analytical review of the extant literature, a brick will be added to reseach on social media and tour operators. An in-depth analysis of the 17 publications included in the systematic review will be conducted in the followings.

4.3.3.1 Topics

Among the seventeen included publications. very few focused directly on tour operators and their relationship with social media and ICT. Some content about the topic of the present review was found in studies concerning travel agencies and the use of social media in their inter-firm relations, other was identified in studies focusing on the whole travel industry.

The review research returned an outcome of 9 different specific topics, plus the two general issues connected to the research questions: *the impact of social media on tour operarors* and their *usage and perception of ICT* (Table 4.11).

Table 4. 11 Specific topics about Social media

	20 08	20 09	20 10	20 11	20 12	20 13	20 14	20 15	20 16	20 17	20 18	Total	%
TO SM use/perception						1		2	1		1	5	23%
TA SM use/perception	1									1		2	9%
Social media impact						1		1		1		3	14%
SM impact on TO/TA relationship			2				1					3	14%
AR VR gamification											1	1	5%
E-Ticket											1	1	5%
SM for marketing											1	1	5%
online review management									1			1	5%
Facebook						1						1	5%
CRM						1						1	5%
Dynamic packaging technologies	1											1	5%
Online distribution platforms						1						1	5%
Web 2.0						1						1	5%
TOTAL	2	0	2	0	0	6	1	3	2	2	4	22	100%

Note: Since many publications were dealing with more than one topic the sum is higher than 17
Note: TO: tour operator; TA: travel agency; SM: social media; AR: augmented reality; VR: virtual reality

With regard to the three research questions set for the present review, very few publications among those included in the work, are dealing with *the impact of social media on the travel companies* (6). Approximately the same number of articles (7) were found to be focusing on the tour operators *use and peception of social media*, but still very few considering the wide time frame set (2008-2018).

The most recurring topic in the previous literature about social media and travel suppliers is the *social media usage and perception* both among tour operators (5 articles) and travel agencies (2) in their inter-firm relations with tour operators. The 32% of the studies concerned the use and perception of social media. The impact of ICT on tour operators industry or on their B2B relations with travel agencies was dealt by another 28% of the publications. In total, the 60% of the articles (13 out if 17) focused on the research question issues.

Many studies discussed more than one topic. This is the reason why the total in Table 4.11 is higher than the number of articles included in the review.

Having found only one article per each of the specific topics, it was hard to discern some streams other than those connected to the general issues connected to the research questions. About these we will discuss in the followings.

4.3.3.2 Tour Operators' use and perception of social media

From the in-depth analysis of the 17 articles included in the review, a first stream may be outlined among the literature focusing on the **factors that influence the adoption of social media** among the tour operators.

For instance, a recent study by Matikiti et al. (2018) on small tourism businesses (travel agencies and tour operators) in South Africa, examines the factors influencing the attitude towards social media marketing adoption and tries to establish whether technical knowledge moderates the relationship between the attitude towards and the level of social media marketing usage. Their work shows that managerial support has a great influence on it. This means that if top management supports the idea of adopting new technologies, the whole organisation's attitude towards new technology adoption will be positive. This is consistent with previous studies such as Dahnil et al. (2014) which concluded that top management influences attitude towards the adoption of e-commerce projects, while Salwani et al. (2009) and Matikiti et al. (2012) found that managerial support influences the adoption and implementation of e-commerce initiatives and Internet technology. The study by Matikiti et al. also confirms that pressure from competitors and managerial characteristics, such as educational level, influence attitude towards the adoption of social media marketing in the South African travel agent and tour operator industry.

Demeke et al. (2016) assessed that ICT adoption or rejection by small hotels and tour operators in Addis Ababa is largely due to political, socio-economic, technological and legal factors. According to the authors the national context plays a vital role in the availability and affordability of ICTs in a country. In Ethiopia, for example, both the political decision on the telecommunication market structure and the economic decision to impose a 40% tax on ICT tools directly influence the adoption or non-adoption of ICT by hoteliers and tour operators.

Similarly, Andreu, Aldás, Bigné and Mattila (2010) in a study on e-business adoption in the context of travel supply relationships ascertained that the use of the Internet among the Spanish travel companies is largely driven by normative pressures. They also found that e-communication with tour operators and the pressure exerted by the sector are the main antecedents for e-procurement[104].

In China security risks and lack of trust were regarded as the most important barriers in online travel service booking, and the shortcomings in the service offered on the Internet by travel organizations was also an important barrier. This is what emerged from the work of Li and Suomi (2008) on travel organizations and internet adoption in China.

From the above analysis of the extant literature focusing on the factors that influence the adoption of social media among the tour operators, it may be said that influencing factors primarily and variously depend on the countries in which travel suppliers work. In fact, the ICT availability and affordability play as barrier to the social media adoption.

With regard to the **usage of social media** and ICT by tour operators the same authors above (Andreu et al., 2010) note a level of e-procurement adoption in travel agencies in Europe which coincides with the European Commission (2006) study, highlighting that ‘‘travel agencies and tour operators are rather strong adopters of e-

[104] E-procurement can be defined as ‘‘a B2B purchasing practice that utilizes electronic commerce to identify potential sources of supply, to purchase goods and service, to transfer payment, and to interact with suppliers’’ (Min & Galle, 2003, p. 3). In the context of travel agencies, we refer to the use of IT for making reservations and procuring e-tickets.

procurement''. These results might reflect some special characteristics of the travel industry. Many wholesalers employ incentives (commissions) and prizes to induce travel agencies to contract services via the Internet.

Inversini, Rega, Pereira and Bartholo (2015), presenting the case study of a small tour operator near Rio de Janeiro also submit a positive example of social media usage, with the possibility of generating socio-economic development in a developing country. The owner of Rocinha Original Tours highlighted that the web presence is a must to be able to exist, and the purpose of using internet is to find tourists and to promote socio-sustainable tourism in Rocinha. The tour operator, besides Facebook, also uses a lot the mobile phone, understanding its relevance to instantly get in touch with customers.

Mkono M. (2016) offers a different perspective on the social media usage by indigenous tour operators in Australia, with regard to the online review management. Direct responses to negative complaints on TripAdvisor were minimal and sporadic on the part of tour operators, with only one out of four suppliers consistently uploading comprehensive replies. From a sustainability perspective, and in view of the cultural friction evident in tourist narratives, the lack of proper engagement with social media is critical, as it indicates a loss of opportunity for cultural brokerage between Indigenous hosts and their guests. It is unsurprising though, as businesses are still learning to adapt to the new digital mobilities introduced by social media.

Yulianto Girsang and Rumagit (2018) offer an insight of Indonesian travel business companies using business intelligence for social media interaction through existing data in Facebook and Twitter. The authors assess that, electronic ticket (e-ticket) provider services are growing fast in Indonesia, making the competition between companies increasingly intense. To get back the feedback of their customers or to communicate directly with them, many companies use social media (Facebook and Twitter). The most frequent Facebook activity for companies is to reply to the comments from tourists. Many companies also retrieve social media data about the consumers for analysis.

In contrast with the above positive examples, but in a work that was written a decade ago, Li and Suomi (2008) found that travel organizations in China were at the time lagging behind in the adoption of e-commerce in tourism industry. Only a few innovative travel organizations turned out to be at the early adoption stage of Internet and to have experienced the benefits and advantages of early-adopters. Though online channels offered and still offer more opportunities for the travel service providers and online intermediaries, tour operators still needed the cooperation with travel agents in their online booking services. The study also suggested that travel organizations in China should have learnt from developed countries how to develop e-tourism and improve the competitiveness of tourism in China. Although the very fast evolving social media landscape is certainly no longer the same, this work offers a picture of the delay experienced by the Chinese tour operators in the social media adoption and gives an idea of their, at the time, negative perception of ICT. As said above, when discussing about the factors influencing social media adoption, security risks and lack of trust were regarded as the most important barriers in online travel service booking, and the shortcomings in the service offered on the Internet by travel organizations was also an important barrier.

In general, the analysed literature on the usage of social media by tour operators offers positive examples from Indonesia, to Brasil passing by Europe and Australia.

With regard to the perception of social media not much has been found in the analysed articles, at least not enough to trace it back to a stream.

4.3.3.3 The impact of social media on Tour Operators

With regard to the literature on the impact of social media on tour operators' business success two different perspectives are analysed. On the one hand the relations of Tour Operators with Travel Agencies in their inter-firm (B2B) connections and on the other hand the relations of tour operators with the final consumers in their B2C connections.

The previous literature had already highlighted the role of ICT in inter-firm relations confirming that they facilitate and strengthen B2B relations and may have important advantages in terms of efficiency (Stamboulis and Skayannis, 2003; Odekerken, Schroeder et al., 2003). However, some authors used to note that technologies may hinder the development of B2B relationships because they can depersonalize the service and therefore destroy the emotional link that is created in personal interactions (Bhappu and Schultze, 2006; Gremler and Gwinner, 2000). Although some authors maintain that the relationships between satisfaction and loyalty are stronger in companies with more advanced technologies (e.g. Ruiz-Molina et al., 2010) others argue that these technologies do not have a significant impact on relationship variables (e.g. Bhappu and Schultze, 2006).

In a work which is out of the range of search but anyway interesting for the present review, Sigala (2007) assessed that internet capabilities should be used for enhancing inter-firm communication which in turn due to its mediating effect can further support and foster the social and relational bonds such as trust, dependence and satisfaction that are required for building and maintaining inter-firm relationships. Although previous research had advocated that the internet may inhibit the development of inter-firm relations because of the limited possibilities of interpersonal interactions, her study has revealed that such an argument is not anymore valid.

Moliner-Velazquez et al (2015) in a study on relationship marketing in the travel industry B2B context found that another way of improving long-term customer relations might be through investment in information and communication technologies (ICT). In fact, they consider that the adoption of ICT in relationships in the tourism marketing channel offers enormous opportunities and recommend that providers invest in technologies without forgetting the importance of personal interaction in the emotional links between employees.

Senders, Govers and Neuts (2013) analysed the business to consumer relations of tour operators from a consumers perspective[105], but still, offering key issues to understand the impact of social media as a consequence of TOs activity on it. Applying a relational benefits approach, the authors showed how social media affect customer loyalty to tour operators. Their findings suggest that tour operators should intensify their personal relationships with their clients, by making them feel personally recognized and creating an online friendship. According to the authors, tour operators should also focus on triggering customers' interest and attempt to bring pleasure to their customers through social media. Customers' trust also proved to be influencing customer loyalty, so they suggest, tour operators should try to reduce the anxiety of customers by communicating their reliability as well. As these were exactly the customer service elements that were perceived to be under

[105] The authors asked customers that have liked or placed comments on tour operators' Facebook pages what they were hoping to get out of their engagement.

pressure from disintermediation and a reduced role of the travel agent in travel distribution, they conclude, social media might just be a critical key to future success of the tour operator.

Finally Pereira et al. (2015) investigating the Virtual Reality (VR), Augmented Reality (AR) and gamification implementation in tourism, assess the value and advantages of using these technologies for tour operators' marketing purposes. In particular those technologies may be used to promote tourist destinations, creating value for customers through sensory experiences and involving them with the aim of creating trust and brand fidelity.

4.4 Conclusion

The present work adds an important brick to the very scarce literature on tour operators and their relationship with ICT and social media. The study reveales the state and trend of current research on social media in the travel industry, in terms of adoption and usage, perception of the usefulness of the media for the business success and the impact of ICT on tour operators' business. A quantitative content analysis approach and a systematic review process have been used to assess the knowledge and discussion about the issues above.

While there is a growing body of research on social media in the hospitality industry (See chapter 2), tour operators industry has received very limited attention as yet. We may say that research on social media and tourism, including all the issues concerning the consumers' perspectives and DMO, which are the greatest part of this stream, is in its mature stage. Research on social media and hospitality businesses, in the suppliers perspective, is still in its infancy. Then, if so, research on social media and tour operators is in its embryonic stage, i.e. it still did not emerge. In fact, only 17 publications on a timespan of 11 years turned out to be eligible for inclusion in the review. Only a scarce 13% out of all articles located using the systematic review process, in the time frame from 2008 to present, from three databases (Scopus, Web of Science and IFITT).

The descriptive review allowed examination of the 17 articles and proceedings based on different dimensions: the number of publication by year, the number of publications in journals, subject area, research methodology and design, type of publication, geogaphy, authorship and social media topics. Being the literature included in the review so limited in depth and breadth, it was impossible to discern main trends based on the above dimensions.

In the analytical review in-depht analysis was conducted based on the research questions and across the research topics. But there again it was difficult to extract some common features in order to lead the articles back to a literature stream.

The major part of the publications included in the review concern the usage of social media by tour operators. The use and adoption of social media and ICT are mainly investigated in the stream of inter-firm relations, often observing the phenomenon from the travel agencies perspective. A part of the extant literature on this topic focuses on the factors that influence the adoption on social media. A smaller part of the previous literature is dedicated to the impact of social media on tour operators. There two main perspectives of research may be identified: the impact of social media on the inter-firm (B2B) connections and on the other hand on the relations of tour operators with the final consumers in their B2C connections.

According to the literature included in this review research, the impact of social media is overall positive, and it acts mainly on customers loyalty, as for the B2C context, and on the enhancement of connections and the strenghtening of long-term relations with the travel agencies in the B2B context. Equally, the analysed literature on the usage of social media by tour operators, reveals almost positive situations of knowledge and use of ICTs from Europe, Brasil, Indonesia and Australia. Finally, as for the literature focusing on the factors that influence the adoption of social media among the tour operators, which is a topic stemming from the analysis, it emerged that influencing factors primarily and variously depend on the countries in which travel suppliers work. In fact, the ICT availability and affordability play as barrier to the social media adoption.

The main issue about the present review research remains the fact that too scarce attention has been paied by scholars on social media in the tour operators industry. Much remains to investigate.

4.5 Limitation

This study has some limitations that need to be pointed out.

First, the research is not exhaustive. With more time and resources I may have searched in other databases than those chosen (Scopus, Web of Science and IFITT). Although a first scoping on other online archives was done and the three chosen databases seemed to be the most comprehensive ones, for the topic, I may perhaps have found more publications extending the search to other databases or else inquiring the non published work. Or else, a deeper analysis of the reference lists of all articles found with the searching process may have retreived some more articles eligible to be included in the review.

Second, the work focused only on tour operators and since it emerged that many aspects of the social media adoption or of the impact of ICT are strictly connected to the inter-firm relationship with travel agencies, a wider study on the whole value chain may have helped in finding more literature on the topics. For instance using travel agency as a key word in the searching process. Also, maybe an analysis starting from the hospitality industry's relationship with their distributors could have retrieved some additional work.

Third, this study analyzed social media research based on several dimensions: the number of articles per each year from 2008 to 2018, the number of articles in each journal, and the subject area, the type of publication, research methodology and design, authorship trends and topics. Other dimensions (e.g. citations, affiliations, etc.) were not explored because of the lack of that kind of data in the IFITT database, but possibly a wider search on google may have returned the information to allow a comparison.

4.6 Future research

Some of the future prospects for research have been anticipated above and concern the possibility to enlarge the selection criteria and to inquire more databases, to gather a more comprehensive view of social media literature for analysis.

The findings of the systematic review suggest that literature on social media and tour operators is still at its embryonic stage. Wide areas of research have received no attention at all, and many others need more investigation.

First, empirical research on the usage of social media by tour operators is highly recommended. While some research explored the use of ICT in the inter-firm relations with travel agencies, nearly no work has investigated, as yet, the usage or adoption of social media and the extent to which it is used, from the TO perspective. There is inadequate information on the frequency and modes of use and on the TO's perception of the usefulness of ICT for the business' success.

Second, since the ICT revolution has brought many tour operators to directly deal with consumers as an effect of the disintermediation, their usage of social media should be investigated separately with respect to the B2B relations with travel agencies and the B2C relations with tourists. If the inter-firm online relationships with travel agencies have been sufficiently researched, nearly no attention has been paied, as yet, to the TO's interaction with tourists through social media, where it is the case. In particular, an interesting field of further research, could be the online review management, considering that travel companies are often under the tourists' fire among Tripadvisor reviews. But all kind of User Generated Content management (e.g. on Instagram, Youtube or Facebook etc.) would be as interesting for further investigation.

Third, the impact of social media on the tour operators' business success should be further investigated. For instance, social media metrics could be used to analyse the impact of the travel companies' activity on the net. In any case, being the research on tour operators and social media still at its embryonic stage, there's wide room for futher investigation.

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Chapter 5

SOCIAL MEDIA
in the
TOUR OPERATOR INDUSTRY
an
EMPIRICAL RESEARCH

5. Abstract

As the literature review in chapter four has outlined, research on tour operators and social media is still in its embryonic stage. Scholars have paied very scarce attention, as yet, on the usage and adoption of ICT by tour operators. This empirical research will try to fill the gap on the knowledge about the use of social media by tour operators analysing the online visibility and the activity on the main social media of a group of Italian Tour Operators being awarded the Italia Travel Awards in the last three editions.

The study uses a mixed methods exploratory approach with a multiple case study research method to assess both the extent to which tour operators are using social media and the impact of their activity in terms of brand recognition and reputation.

The findings show that travel groups actively use social media, generally posting on a regular base but they could do more in terms of interaction with users. The impact of their activity on social media is satisfying both in terms of online visibility, thus brand recognition and in terms of sentiment.

The originality of the work is that it offers a real insight into the TO activity on social media, filling a gap in research.

Keywords

Tour operators; social media; social media monitoring; online visibility; travel industry; tourism; ICT

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5.1 Introduction

5.1.1 The distribution channel

Travel and tourism is a highly fragmented, information-oriented industry, thus, very receptive to the benefits of the Internet (European Commission, 2006).

In the last decade ICT and social media have significantly revolutionized the travel industry and the whole tourism value chain affecting the way organisations distribute their tourism products in the marketplace (Poon,1993; Fesenmaier, Klein, Buhalis, 2000; Sheldon, Wöber, Fesenmaier, 2001).

Traditionally, the travel distribution role has been performed by outbound travel agencies, tour operators (TOs) and inbound travel agents or handling agencies (Buhalis and Laws, 2001). The advent of the Internet as a universal and interactive means of communication, and a parallel change in consumer behaviour and attitude, created the conditions for the emergence of new players in the travel industry, which altered long established balances of power between existing players and distribution channels.

ICTs have been changing the way in which travel industry business is conducted, since the early '70s, with the development of Computer Reservation Systems (CRS), and later, in the '80s, the Global Distribution Systems (GDS)[106]. Then, the development of the Internet in the '90s generated not only a paradigm shift but an actual change in operational practices in the industry (Buhalis and Law 2008; Ip et al. 2011). The Internet age brought, first, to the emergence of online travel agencies (OTAs)[107] such as booking.com, (Inversini and Masiero 2014) Opodo, Expedia and many others.

[106] GDS began in tourism industry as airline computer reservation systems (CRS) as technical electronic intermediaries (Buhalis and Licata 2002)

[107] OTAs are online companies who's websites allow consumers to book various travel related services directly via Internet. They are 3rd party agents reselling trips, hotels, cars, flights, vacation packages etc. provided / organised by others.

Then, to the growing popularity of meta search travel sites such as Kayak, Trivago, Google and TripAdvisor[108] to name a few. Metasearch sites originally presented travelers with a spectrum of inventory before sending to an OTA for booking, Now, their model has evolved to include booking buttons directly within the results. These bookings are, typically, still transacted by a third-party merchant, even though metasearch sites, eased by the customers' perceptions of these as unbiased online one-stop shops, now compete directly with direct-to-supplier channels. These new business models are essentially a combination of a merchant model with dynamic packaging (Fountoulaki et al. 2015). Furthermore, the rising relevance of online social networking sites, online review sites (e.g. Tripadvisor) as well as mobile location-based services and Peer to Peer[109], has added additional channels of distribution, which shifted the power of booking towards the consumer (Scaglione et al. 2013).

According to Kracht and Wang (2010) this evolution and transformation of tourism distribution channels resulted in greater choice for the consumer and increased competition for distribution participants. The authors assess that players in the Tourism Distribution Channels model are: consumers, online travel agents, web-able corporate travel agents, web-able tour operators, Global Distribution System (GDS) incoming travel agents, switches, destination marketing organizations (DMOs), web browser, other search engines, suppliers website and meta-search engines.

ICTs have introduced complexity to the distribution system (Fig. 5.1) with various permutations such as additional layers of intermediation or disintermediation when certain players bypass traditional intermediaries.

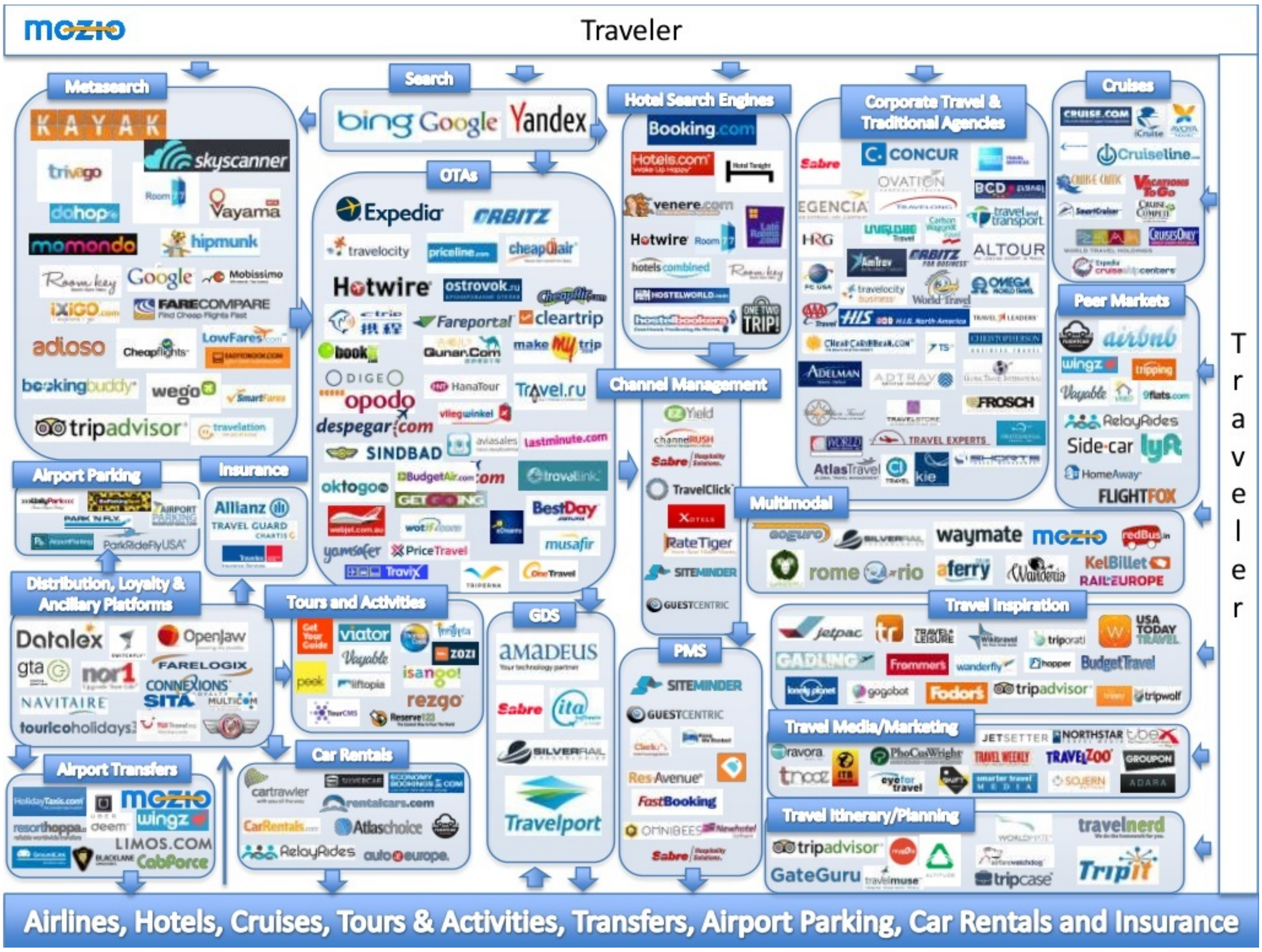
Dis-intermediation is associated with a significantly reduced role of traditional intermediaries (travel agencies and tour operators) in the tourism supply chain, due to the

[108] Tripadvisor now allows instant booking, taking a percentage of the booking revenue, in the same way an OTA does.

[109] Peer-to-peer is a new approach that is revolutionizing travel. P2P sites provide one-on-one gateway to unique non-commercial, and often more affordable alternatives to hotels, car rentals, and experiences connecting directly to the owners or offerers of various goods and services. Examples of P2P sites are Airbnb, Uber, etc.

introduction of electronic means that enable consumers to directly deal with suppliers. The re-intermediation process refers to the emergence and the proliferation of online travel intermediaries (OTA, Metasearch, etc.), some of which have achieved such a growth in recent years, to be able to directly challenge the longer established tour operators such as TUI, MyTravel or Thomas Cook.

Fig. 5. 1 The complexity of distribution channels



5.1.2 Tour Operators

Tour operators typically combine tour and travel components to create a package holiday, advertise and produce brochures to promote their products, holidays and itineraries[110]. They then, sell packages through retail outlets or travel agencies in a B2B context or directly to the traveller in a B2C context. Tour operators work closely with hotels, transportation providers, and attractions in order to purchase large volumes of each component and package at a better rate than the traveller could find if purchasing individually.

Tour operators have emerged as one of the most powerful and influencing actors in the tourism industry (Picazo, Moreno-Gil, 2018) given their knowledge of the target market (Falzon, 2012), their influence on the direction of demand flows from the main source markets towards the tourist destinations (Schwartz, Tapper, & Font, 2008), their marketing activities and their control over the distribution channels and air connectivity (Koutoulas, 2006). Tour operators control a large part of the tourist experience given their volume, their influence in the image creation process, and their negotiation power with the different agents in the destinations (Falzon, 2012). Tour operators also exert a predominant role in fixing the prices in the tourism industry (Aguilo, Alegre, & Riera, 2001). This influence is particularly relevant in certain geographical regions such as Europe, where they have been the most important facilitators of international travel for the last five decades (Alegre & Sard, 2017).

In the European mass tourism industry, the tour operators oligopoly has brought to price and offer standardisation, developing a dependency relationship of both destinations and acommodation firms with the tour operators, since their success was linked to being featured, and how, in the programs of foreign tour operators and their brochures (Kwek, Wang, & Weaver, 2014).

However, as said above, in the last decade, the distribution landscape and the tour operator industry have gone through significant changes, such as the expansion of low cost airlines, the development of eMediaries, a rise in direct sale, the so called P2P, and the increasing number of independent travellers, all of which have resulted in more competitors in the market (Picazo, Moreno-Gil, 2018) and as such, an increasingly competitive

[110] Source <https://en.wikipedia.org/wiki/Tour_operator> [Accessed: June 2018]

marketplace. Nowadays, both tour operator's marketing strategies (new brands, segmentation strategies, labels, etc.), and the price management, are deeply influenced by OTAs, other internet-based travel companies and the new distribution ecosystem (Fountoulaki, Leue, & Jung, 2015; Ling).

The ICT revolution has brought to tour operators both challenges (more competitors, pressure exerted by new eMediaries, etc.) and opportunities. In particular, social media have empowered tour operators to act in a B2C context selling directly to travellers, thus bypassing travel agencies. Social media has provided both sellers (TO) and travellers with new tools that allow interplay between the two parties. Consumers have the possibility to share and seek information and opinions on goods and services via social networking websites, such as blogs, forums, services that aggregate opinions on goods and service (e.g. TripAdvisor.com), price comparison websites (e.g skyscanner.net, kayak.com), and online auction websites (e.g Priceline.com), etc. Conversely, sellers have new means of monitoring Internet user behaviour, which, in turn, has allowed them to employ dynamic prices that differ for various clients wishing to buy the same product or service depending on, for example, previous purchases, place of residence, and level of interest displayed toward a given product related to the time spent on the website (Szopiński, 2017). Thus, the development of modern technologies has deeply influenced interactions between consumers of tourist services and tour operators as well as travel agencies.

Despite the increasingly influential role played by ICT and social media in the tour operators industry there is a relative paucity of academic literature on the subject and little work has been done to date to examine in detail Tour Operators online visibility and the extent to which they use social media in their interactions with the travellers.

5.2 Methodology

Research on ICTs in the tour operator industry is still at its embryonic stage. The systematic review in chapter 4 did retrieve no study on the effective usage of social media by travel suppliers, nor on their online presence and interaction with the travellers. The present research will try to fill the gap analysing the online visibility of a group of Italian tour operators, monitoring their activity on some of the most common social media and the travellers interaction with them through their accounts.

The study uses a mixed methods exploratory[111] approach on a quite unkown field of research with a multiple case study research method[112].

The research questions on which the study is based are the followings:

1. Do Tour Operators use social media?
2. Which is the impact of Tour Operators' activity on social media?

The first research question will be answered by monitoring the tour operators social media activity on the main social networks. The second research question will be answered by investigating the online visibility of tour operators as a measure of the brand recognition, and the user generated content stream about their brands, as a measure of the brand awareness and reputation.

The empirical research will go through different stages. In the first stage the online visibility of the group of Italian tour operators will be assessed using an adaptation of the Online Visibility Index proposed by Drèze and Zufryden (2004). Then a social media monitoring of the TO's accounts on Facebook, Twitter, Youtube and Instagram will be

[111] As Babbie (2007) contends, the exploratory approach typically occurs when a researcher examines a new interest or when the subject of study itself is relatively new.

[112] The case study method focuses attention on one or a few instances of some social phenomenon. The case being studied, for example, might be a period of time rather than a particular group of people. The limitation of attention to a particular instance of something is the essential characteristic of the case study (Babbie, 2007).

conducted through FanpageKarma[113], an online tool for social media analytics and monitoring. Finally, the stream of user generated content will be analysed through Socialmention[114] to compare strenght and passion, sentiment and reach of the tour operators brands among the travellers. This last stage will measure the impact of the travel companies' activity on social media in terms of brand awareness and reputation.

Before landing to the here implemented research design and method, a different attempt to conduct a quantitative analysis through surveying was made. The idea was to interview both travel agencies and tour operators in order to investigate the use of social media in the inter-firm relations among them. So, first, in 2017 a survey focusing on the relationship between tour operators and travel agencies in terms of efficiency of the social media communication and of the possible need for more intense activity, was sent to all italian travel agencies through google drive. Out of a total of 870 TAs, 255 questionnaires were completed with a 29% return rate. The findings showed that the Italian travel agencies are, moderately happy with the use of social media in the interfirm relations with tour operators, but in general they do not consider it as an important factor (only the 8% of the TAs believes that social media are very important in the inter-firm communication with TOs).

In the second phase a survey on the use of social media was sent to all italian tour operators, with unfortunately no success, despite several recalls. Tour operators were invited to partecipate by email. Maybe another media would have returned more answers. In any case this made me reconsider the whole research (keeping the travel agencies enquiry results for a further research). Starting from the fact that the literature review in chapter 4 highlighted a few issues which have still not been investigated by scholars, I decided to address my work to the TOs' online visibility, social media activity and the effects of it on Travellers User Generated Content. The richness of data and analytics tools available on the net certainly pushed in that direction.

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[113] Fanpage Karma, founded in 2012, is an online tool for social media analytics and monitoring. It provides valuable insights on posting strategies and performance of social media profiles like Facebook, Twitter, YouTube, Instagam, Pinterest and Google+. Source <https://www.fanpagekarma.com/about> [Accessed: September 2018]

[114] Social Mention is a social media search and analysis platform that aggregates user generated content from across the universe into a single stream of information. It allows to easily track and measure what people are saying about a company, a new product, or any topic across the web's social media landscape in real-time. Social Mention monitors 100+ social media properties directly including: Twitter, Facebook, FriendFeed, YouTube, Digg, Google etc. Source < http://www.socialmention.com/about> [Accessed: September 2018]

5.2.1 Population

Since I needed to focus attention on a few particular instances of the social media phenomenon, the case study method seemed to be the one that fitted best (Babbie, 2007). Observing the social media activity of all the italian tour operators would have been too much time consuming and very difficult to manage using the online free analytics tools (Fanpage Karma; Socialmention).

The population of tour operators to observe as case studies has been retrieved from the Italia Travel Awards[115] winners of the last three years (Table 5.1). The award is the most prestigious acknowledgement of the commitment and expertise of the Italian travel companies in the Country. The award is massively based on social media communication. The 'oscar' ceremony is live streamed, the voting process is online through the <www.italiatravelworld.it> website and a year-long communications campaign encourages participation. The media resonance for the travel companies is such, that they are led to communicate it through their social accounts.

Only travellers and travel agencies are allowed to vote choosing for each tier (tour operators, cruise companies, airports, travel software, GDS and so on) among all the existing Italian companies. To cast a vote they need to register for an account.

The winners of the last three editions - from 2016 to 2018 - of the Italia Travel Awards in the Tour operators section are listed in table 5.1. They represent both mass-market operators and specialists. A basic distinction among tour operators can be made between 'specialists' as small operators with less than 50 full-time staff that market their products directly, and 'mass-market' operators as the vertically integrated companies that retail through travel agencies.

The interesting thing about choosing the research population among the Italia Travel Awards winners is that it allowed to have a representative sample of the Italian excellences in different categories (mass-market, specialist, OTA, etc.).

[115] < https://www.italiatravelworld.it> [Accessed: September 2018]

Table 5. 1 Italia Travel Awards winners

CATEGORY	2018	2017	2016
Mass Market TO	Eden Viaggi	Eden Viaggi	Alpitour
Specialist TO	Quality Group	Quality Group	Press Tours
Emerging TO	Idee per viaggiare		
Villages TO	Veratour	Veratour	Veratour
OTA	Albatravel	Albatravel	Albatravel

Thus, Alpitour, Eden Viaggi as mass market tour operators, Quality group and PressTours as specialists, Albatravel as online travel wholesaler, Veratour, Idee per Viaggiare and Quality group will be the seven cases investigated in the present research.

5.2.2 Online Visibility

The overwhelming amount of information on social media, customers' lack of trust due to the disintermediation and reintermediation processes, their frustration for not finding the information sought and the need for an expert's recommendation, all these reasons have meant that online visibility can be a differentiating factor for the success of a travel company. Visibility may be a source of competitive advantage both in the use of social media as a distribution channel, improving the number of sales made by this means or as a brand reputation and visibility enhancer, improving the sales through intermediaries.

Thus, assessing the online visibility of a tour operating brand is the first step to understand whether the companies are using ICTs efficiently.

Online visibility can be defined as the extent to which a user, in this case a traveller, would come across an online reference to a company's website (Drèze & Zufryden, 2004).

Usually, both online and offline visibility are associated with the brand recognition by the client. In classical marketing theories brand recognition is assumed to be the result of brand building and brand equity enhancing, typically obtained through advertising campaigns and promotions (Keller, 1998). Considering social media as a mass medium, brand recognition may be achieved through a massive presence on the Internet.

Online visibility can be measured in different ways, but the best option is always the one that takes into account the information sought and the habits of the average traveller. (Smithson S., Devece C.A. and Lapiedra R. 2011).

One of the most important forms of social media presence is through search engines like Google. In this case, the order of appearance in the search engine is the key factor. A website can be visible through advertising on other web sites. A firm can pay for an advertisement in the form of a banner on other websites. In particular a tourism and travel brand visibility may be measured through the presence on specific travellers communities, forums, blogs, social media networking sites (e.g. Facebook groups) and online consumer-generated media such as Tripadvisor, Youtube or Instagram.

For instance, Facebook groups about travel and destinations are a point of reference for many travellers and a rich source of user generated content. Managing a Facebook account is ever increasingly vital for a tourism company since it reaches the highest number of active accounts in the world and offers an ever growing number of tools and features to instantly interact with travellers (see Chapter 1).

On the other hand YouTube and Instagram have become very popular social media among travellers. YouTube channels give high visibility to many attractions and destinations, including villages or hotels, and many bloggers post videos of their journeys. Instagram has become one of the most used social networking site among the travellers, they use it to share their travel experiences and search for inspiration. During the time many travel communities have been created and the #igers are now a very rich source of information about places and things to visit during a journey.

The measurement of online visibility is still at an exploratory stage, and there is not yet a standardised scale widely accepted by researchers. One of the most complete methods of measurement is that proposed by Drèze and Zufryden (2004). Nevertheless, this method is more focused on brand visibility, and average tourists' search preferences are not taken into account. An online visibility measurement applied to the tourism and hospitality industry is the HOVI proposed by Cioppi (2017), which is an adaptation of Drèze and Zufryden's index. Considering that hospitality companies and tour operators are part of the same industry (Tourism) and share the same customer type (travellers), the HOVI could fit properly to my scope.

Thus, taking the HOVI as a base, with just slight adaptation, I created a Tour Operators Online Visibility Index (TOOVI). This will include three main categories:

- Internet
- General social networking sites
- Specific-to-the-travel-and-tourism SNS

For each of the three categories a few indicators have been identified (Table 5.2) based on literature about how Italians do use search engines (Loguercio, 2013) and social networking sites (Lovari and Giglietto, 2012).

Before choosing the indicators some scoping of the global and Italian top rated travel blogs was made to assess whether those media could be considered as one of the indicators. Also, some search on Tumblr[116], which is a microblogging social networking site was made. The only result about the search 'tour operators' was a microblog posted by Presstours[117]. However, results suggested that travel blogs are not a reliable source for verifying the online visibility of tour operators and information is quite difficult to retreive.

[116] Tumblr is a free social networking website that allows registered users to post multimedia content to their own customizable blogs. Members can follow one another, "like" content with the click of a button and comment on posts. A popular tool is the "re-blog" button. Users can click on a post they like and it will be published to their own Tumblr for followers to see. Tumblr limits users to 250 daily posts to control band width use and spamming. Source < https://whatis.techtarget.com/definition/Tumblr> [Accessed: July 2018]

[117] http://presstours.tumblr.com

Table 5. 2 TOOVI Indicators

MAIN CATEGORY	INDICATORS
INTERNET	
Google	order of appearance within the first 4 pages searching "tour operator"
GENERAL SNS	
Facebook	no. of Fans + no. Likes
Twitter	no. of followers + no. of likes
Youtube	no of subscribers
Instagram	no of followers + no. of likes
SPECIFIC SNS	
Tripadvisor	no of mentions
Tripadvisor Forums	no of forums mentioning

For each single indicator, a binary index (0 or 1) was assigned as a measure of the performance. Zero was assigned when no performance measure was to be found (e.g. no mentions or no likes), whereas 1 was assigned to the best performance of that indicator (e.g. highest number of followers).

To all other performances between the worst and the best, was assigned a value between 0 and 1, calculated as a proportion of the best performance for each single indicator. Each single index expresses the measure of the performance in terms of online visibility of the single tour operator compared to best performance for that indicator.

Each index has been assigned the same weigh and a maximum value of 1 so that the sum will be a number between 0 and 10. The sum of the ten indexes brings to the second level index of Tour Operator Online Visibility (TOOVI).

To conclude the online visibility analysis, data from Google Trends will be retrieved to compare the tour operators global performance.

5.2.3 Social media activity

In the last decade, a growing number of tourism researchers have begun to embrace social media as a fieldwork site (Mkono, 2013). Social media monitoring and analysis tools and platforms have emerged to address the need for customer listening methods, as well as to harness the wealth of information available online in the form of user generated content.

The added value of social media monitoring is that it offers access to real customers' opinions, complaints and questions, at real time, in a highly scalable way (Stavrakantonakis et al., 2012). This research employs the free online social listening tool, Fanpage Karma[118], (Wozniak et. al., 2017) to observe the activity of the Italian tour operators on four of the most common social media: Facebook, Twitter, Youtube, Instagram.

The social listening tool Fanpage Karma also offers analytics for Google+ and Pinterest, but those social media returned to be of no interest for the present research since nearly no activity was recorded in the two media by tour operators.

While the online visibility index gives a measure of the impact of the tour operators activity on social media in terms of brand recognition, thus analysing the travellers interaction with the brand (likes, fans, followers, etc.), the social media monitoring will analyse the tour operators' use of social media (no. of posts, comments, answers, etc.) answering to the first research question.

[118] Fanpage Karma, founded in 2012, is an online tool for social media analytics and monitoring. It provides valuable insights on posting strategies and performance of social media profiles like Facebook, Twitter, YouTube, Instagam, Pinterest and Google+. Source <https://www.fanpagekarma.com/about> [Accessed: September 2018]

5.2.3 User Generated Content analysis

In this section, the impact of the activity of tour operators on social media will be analysed in terms of brand awareness and reputation, answering to the second research question. The travellers generated content stream will be analysed through Socialmention (Capatina et al. 2018). Socialmention[119] is a social media search and analysis platform that aggregates user generated content from across the universe into a single stream of information. It allows to easily track and measure what people are saying about any topic across the web's social media landscape in real-time. Social Mention monitors more than 100 social media.

Using Social Mention strength, passion, reach and sentiment of the seven tour operators brands will be compared.

The strenght is the likelihood that a brand is being discussed in a social media, whereas the sentiment is the ratio of mentions that are generally positive to those that are generally negative.

Passion is a measure of the likelihood that individuals talking about a brand will do so repeatedly. If a small group of very passionate advocates talk about a product or service or brand all the time, the company will have a higher passion scorre than that it could get if every mention is written by a different author.

Reach is a measure of the range of influence. It is the number of unique authors referencing a brand divided by the total number of mentions.

[119] Source: <www.socialmention.com> [Accessed: July 2018]

5.3 Findings

5.3.1 Tour Operators' Online Visibility

Data to assess the tour operators brands online visibility (TOOVI) have been retrieved from Google search and Google Trends, from the official online sources of the seven travel companies (social networking sites accounts) and from the specific-to-travel-and-tourism social networking sites (Tripadvisor). At this stage, Fanpage Karma was used to support the data retrieval and analysis.

Many of the wholesalers manage more sub-brands and nearly for each of these they have social networking accounts. However, many of those brands are not part of the core business or are much smaller companies which could have introduced high variability altering the index, thus, for the purpose of the present research only the main umbrella brand for each tour operator has been taken into consideration.

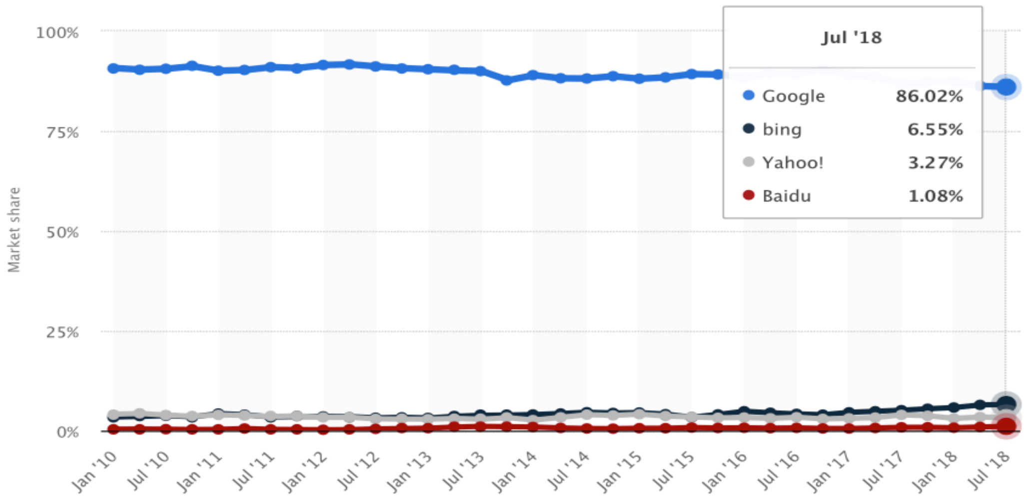
Concerning the three categories of indicators chosen to build the TOOVI, additional explanations on the reasoning behind and on how data have been collected, may be useful.

The **Internet category**, search engines are the most ideal source for customers to gain travel information (Qian, Hu, Zhang, 2015). In fact travelers rely heavily on online information before, during and after their journeys and search engines are the top source for that kind of enquiry[120]. The most common among the search engines is certainly Google, with its average net share of 77% as at 2018[121] and its undisputed leadership over the years (Fig. 5.2).

[120] According to the Google Travel Study, June 2014, Ipsos Media CT Internet is the top source for both leisure (74%) and business travel (77%) planning and search engines are the top online souces of inspiration (61%) Qian, Y. F., Hu, J., & Zhang, M. (2015) According to a survey conducted by China's online tourism industry, 97% of the internet users rely on search engines to look for travel products or reserve services.

[121] According to Net Market Share the global marketing share percentage, in terms of the use of Search Engines heavily favoured Google throughout 2018 - averaging a net share of 77% from January to October 2018. Source< https://www.netmarketshare.com/search-engine-market-share.aspx> [Accessed July 2018]

Fig. 5. 2 Google's market share from 2010 to 2018



Thus, Google in its english version <www.google.com> was considered as the key factor for the website visibility indicator. And, given the potential importance of the order of appearance from search results in the overwhelming amount of information[122], which is the reason why many companies invest in Search Engine Optimisation[123], only the appearance within the first four pages of search results was taken into consideration (Drèze and Zufryden, 2004, Cioppi, 2017). The keywords "tour operator" written in quotes, was searched and results ranked assigning the highest score (10) to the group, out of the seven tour operators, appearing in the first position and 0 to those brands that did not appear at all in the first 4 pages of search results. Since the ranking in the search engine results page (SERP) is a dynamic and variable value depending on a lot of factors[124], values assigned to the indicator may vary, as well, if repeated.

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[122] According to SearchEngineWatch.com websites that are on top grab 36.4% of the traffic which is missed by lower order websites Source: <http:searchenginewatch.com> [Accessed July 2018]

[123] Search Engine Optimisation (SEO) is the umbrella term for all the methods you can use to ensure the visibility of your website and its content on search engine results pages (SERPs).

[124] Google uses a trademarked algorithm called PageRank, which assigns each Web page a relevancy score A Web page's PageRank depends on a few factors:

- The frequency and location of keywords within the Web page: If the keyword only appears once within the body of a page, it will receive a low score for that keyword.
- How long the Web page has existed: People create new Web pages every day, and not all of them stick around for long. Google places more value on pages with an established history.
- The number of other Web pages that link to the page in question: Google looks at how many Web pages link to a particular site to determine its relevance.

With regard to the category **general social networking sites** the choice fell upon Facebook, Twitter, Youtube and Instagam, since these are the most used SNS among both travellers and tour operators. The possibility to add Google+ and Pinterest was also evaluated but nearly no activity was registered on the tour operators' accounts. Among the general SNS, Youtube happens to be the top source of online inspiration for travellers (42%), according to Google's Research, 'The 2014 Traveler's Road to Decision' and it is also the most active social media platform in Italy (62%), immediately followed by Facebook (60%) which is, instead, by far, the most used SNS globally (see chapter 1.3). On the other hand, numerous travel groups have cropped up on Facebook in the last years to help travellers make their experiences all the more enjoyable and to connect with other like-minded individuals sharing the same passions, experiences and travel tips[125].

Sites like Facebook, Youtube, Twitter and Instagram, although not directly related to travel and tourism, are affecting consumer travel decisions at every stage, because travel choices are heavily influenced by recommendations from other people and coming across a friends' vacation photos, videos, tips or comments has a great power to let people start dreaming about travel. Thus, travel companies are more and more using their accounts on Fb, Yt, Tw an Ig to showcase travel destination photos or videos and gain visibility[126]. The indicators that were considered to fit best in order to assess the visibility performance of tour operators and build the TOOVI for each of the SNS are those listed in Table 5. 2.

As for the **specific-to-travel SNS,** Tripadvisor and Tripadvisor Forums have been considered as being the best choices for the TOOVI construction, both in terms of popularity and data availability. Tripadvisor, besides being a popular starting point for many travel searches, especially in the earliest phases of travel research, with its 500 million reviews and opinions reached in 2017 and the 290 pieces of content being posted every minute of

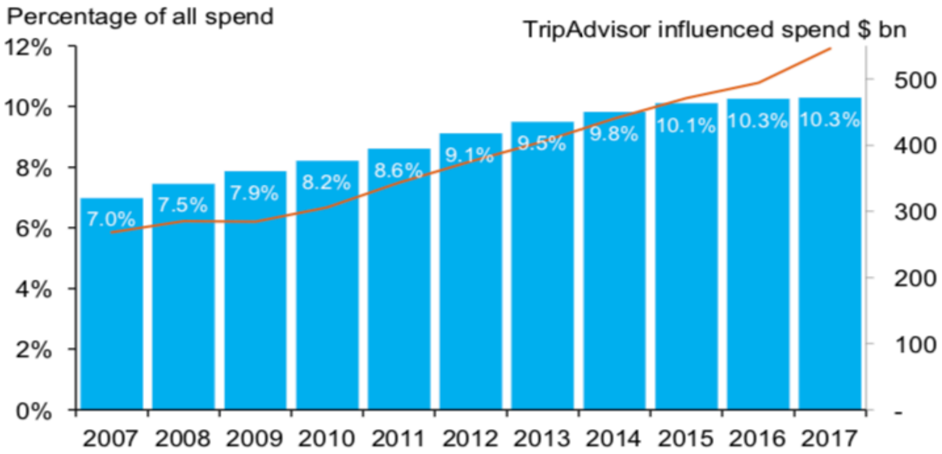
Source <https://computer.howstuffworks.com/internet/basics/google1.htm> [Accessed: July 2018]

[125] A list of Facebook travel groups may be found here <https://wickedwalkabout.com/29-facebook-groups-for-travel> [Accessed: July 2018]

[126] EyeforTravel researchers for instance, point out that three out of five travel companies (60%) are now using Instagram to showcase their travel destination photos. Source: <https://www.eyefortravel.com/social-media-and-marketing> [Accessed: September 2018]

every day, is also strongly influencing the total tourism spend globally[127] (*Fig. 5. 3*). In addition Tripadvisor has lately introduced instant booking, becoming a powerful booking channel for accommodations and a competitor to the OTAs.

Fig. 5. 3 Tripadvisor total tourism spend influence - Global



Source TripAdvisor Strategic Insights & Oxford Economics 2018

The best fitting indicators of the tour operators performance on Tripadvisor, since there are nearly no direct reviews on tour operators, turned out to be the mentions, i.e. a reference to the tour operator in a review about an accomodation, a destination or an attraction and the forums about travel and destinations[128]. The value relating to the forums indicator tells the number of forums in which a particular tour operator is cited, whereas the mentions value says how many times the search term, which corresponds to the tour operator's name, appears in a review.

Following the online visibility measurement process, as illustrated in chapter 5.2.2, first of all, data for each indicator have been collected. Then, a preliminary coding sheet was prepared on excel. containing data from the 3 categories (Internet, general SNS and specific SNS) and 10 indicators (See Table 5. 2) in order to calculate the visibility performance. A binary index (0,1) was assigned as a measure of the visibility performance of the tour operators for each single indicator. Zero was assigned when no performance measure was to be found (e.g. no mentions or no likes), whereas 1 was assigned to the best performance

[127] TripAdvisor Strategic Insights & Oxford Economics 2018 Source:< https://mk0tainsights9mcv7wv.kinstacdn.com/wp-content/uploads/2018/09/Worldwide-Tourism-Economics-2017-compressed.pdf> [Accessed: January 2018]

[128] Source: <https://www.tripadvisor.com/ForumHome> [Accessed: January 2018]

of that indicator (e.g. highest number of followers, fans). To all other performances between the worst and the best, was assigned a value between 0 and 1, calculated as a proportion of the best performance for each single indicator.

Then, after some calculations, the tour operators' brands visibility perfomance in Table 5.3 was obtained. The visibility performance shows at a glance which tour operators are the best performing.

Table 5. 3 Visibility performance

	INTERNET	GENERAL SOCIAL NETWORKING SITES							SPECIFIC SNS	
	GOOGLE "tour operator"	FACEBOOK		TWITTER		YOU TUBE	INSTAGRAM		TRIPADVISOR	
TOUR OPERATORS	Order of appearance	Fans	Likes	Follow ers	Likes	Subsc Ribers	Follow ers	Likes	Mention	Forums
ALBATRAVEL	0	0,006	0,005	0	0	0,005	0	0	0,0008	0,007
ALPITOUR	1	0,307	1	1	1	1	0,0006	0	0,8333	1
EDEN VIAGGI	0,9	0,634	0,056	0,538	0	0,875	1	1	0,6667	0,981
IDEE PER VIAGGIARE	0,1	1	0,076	0,462	0,316	0,112	0,391	0,810	0,0017	0,003
PRESS TOUR	0	0,180	0,013	0,181	0,129	0,114	0,070	0,093	1	0,015
QUALITY GROUP	0	0,278	0,244	0,065	0,239	0,072	0	0	0,0002	0,056
VERATOUR	0	0,458	0,250	0,315	0,284	0,844	0,413	0,620	0,25	0,705

Finally, summing all the values of the ten indicators per each tour operator tier, a second level index was achieved, which is the final TOOVI (Table 5.4). The tour operators online visibility ranking shows Alpitour as the top performer, closely followed by Eden Viaggi. Among the specialist tour operators, Press Tours performes better, while Quality Group and the OTA Albatravel are the less online visible tour operators.

The Alpitour supremacy in the online visibility may be explained by the fact that the company is the leading Italian travel and tourism group, with a turnover of 1.2 billions € in 2017 of which 720 millions for the tour operating business (10,8% growth). Thanks to the recent deal with Eden Viaggi the new group will reach 1,6 billion euros in revenues (400 million euros from Eden Viaggi and 1.2 billions from Alpitour) and 2 billions in 2019[129].

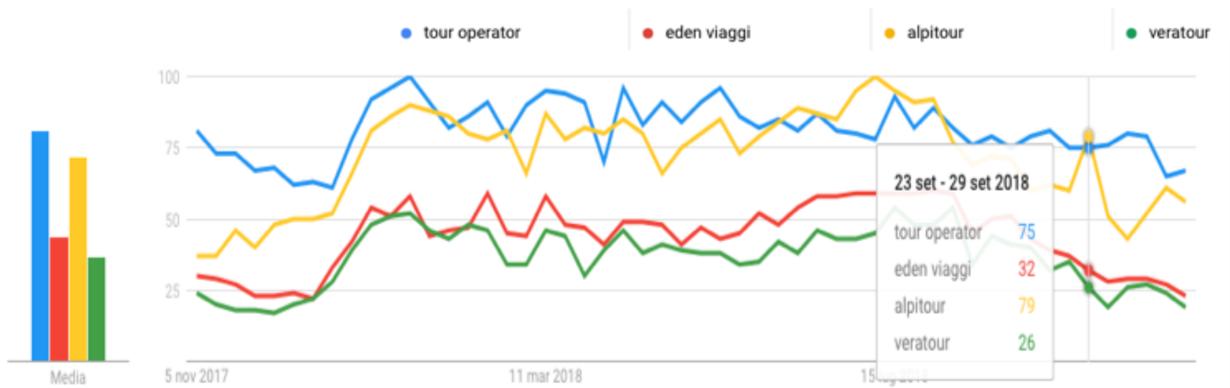
[129] Source: <https://www.ilsole24ore.com/art/impresa-e-territori/2018-07-09/alpitour-cresce-oriente-ricavi-aumento-108percento-191618.shtml?uuid=AErwoMJF&fromSearch> and

Table 5. 4 TOOVI tour operators online visiblity index

TOUR OPERATORS	TOOVI
ALPITOUR	7,14
EDEN VIAGGI	6,65
VERATOUR	4,14
IDEE PER VIAGGIARE	3,27
PRESS TOURS	1,79
QUALITY GROUP	0,95
ALBATRAVEL	0,02

Just to double check the online visibility performance of the tour operators on Google, we searched the words "tour operator" on trends.google.com. In the top 25 most searched *associated queries* globally, the only three TO (out of the 7) ranked are the three TOOVI best performers. Eden viaggi shows up in the 10th position, whereas Alpitour ranks 12th, just before Tripadvisor (14th) and Veratour (19th). No other of the studied cases show up in the *associated queries* ranking. If we compare the world's search trends for the three most visible tour operators (Fig. 5.4), it is evident that Alpitour has the highest interest over time, often overcoming the general search for the keywords 'tour operator' in the same period.

Fig. 5. 4 Global search trends - interest over time



Note: the value showed is a proportion of the highest level of search interest for that period and area

Analysing the search interest per geographical area, the interesting thing is that Veratour, being specialised in holiday villages, shows the widest area (Fig. 5.5).

<http://vincenzochierchia.blog.ilsole24ore.com/2018/05/02/tour-operator-con-alpitour-eden-viaggi-tamburi-batte-bonomi-2-a-zero/> [Accessed: September 2018]

Fig. 5. 5 Global search trends - interest per geographical area

An insight of the three leading companies in terms of who they are, what they do and how they communicate on social media will ease a comparison among them.

Alpitour World is the leading Italian group operating in nearly all the branches of the travel and tourism industry. Founded in 1947 as Alpi and then in 1960 as Alpitour by Lorenzo Isoardi, the group has its headquarters in Turin (Italy). Its core business is tour operating but the group is also active in the air transport sector with Neos company, in the hospitality business with the brand ‘’Voi Hotels’’, and in the incoming services through the Jumbo Tours Group which has its headquarter in Palma de Mallorca. Finally, the group is also active in the selling of travel packages through a ’’joint venture’’ with Costa Crociere as well as through the travel agencies networks ‘’Welcome Travel’’ and ‘’Geo’’. Lately, in September 2018, Alpitour has signed a deal with Eden Viaggi, so becoming the largest group in Italy with a 2 billion estimated turnover for 2019. Its main brands are Francorosso, Viaggidea, Bravo Club, PressTours, Karambola, and Swantour.

Its website is www.alpitour.it and it is in Italian, with no translation in other languages. There, at the very end of the page you can find links to its social networking sites accounts including a Spotify[130] channel:

- Facebook - https://it-it.facebook.com/AlpitourWorld/
- YouTube - https://www.youtube.com/user/gruppoalpitour
- Twitter - https://twitter.com/alpitourworld
- Instagram - https://www.instagram.com/alpitour_world/
- Spotify - https://open.spotify.com/user/alpitourworldofficial

Eden Viaggi has been founded in 1983 in Pesaro (Italy) by Nardo Filippetti. Tour operating is its core business. The Eden Viaggi distribution network is made up of about 9.500 agencies that sell its products. 2,500 of these are “TOP” agencies with whom Eden Viaggi has set up a commercial and co-marketing partnership. The company has an incentive division and an Incoming branch. Its brands are Eden Village (for holiday villages), Margò, Turisanda, Made (taylor made travels) and the last entry is Hotelplan. As said,

[130] Spotify is a music streaming platform launched on 7 October 2008. As of 20 August 2018, it is available in 65 regions. It provides DRM-protected content from record labels and media companies. Spotify is a freemium service; basic features are free with advertisements or limitations, while additional features, such as improved streaming quality and music downloads, are offered via paid subscriptions.

recently Eden Viaggi has become part of the Alpitour Group. The turnover in 2017 reached 370 million euros. In the same year the employees were about 670.

Its website is www.edenviaggi.it and it is only in italian. There, at the very bottom of the page, you can find links to its social networking sites accounts:

- Facebook - https://www.facebook.com/EdenViaggi
- YouTube - https://www.youtube.com/user/edenviaggi
- Twitter - https://twitter.com/EdenViaggi
- Instagram - https://www.instagram.com/eden_viaggi

Veratour, located in Rome, was founded in 1990 by Carlo Pompili. The company is a leader in the holiday villages branch, which is its core business. They manage over 40 villages with the brand 'Veraclub' in different areas of the world. They used to, but do no longer have an incoming division. Its turnover in 2017 reached 204 million euros and in the same year the staff headcount was 130. Its website is www.veratour.it and it is only in italian. There, again, at the very bottom of the page, links to its social networking sites accounts are to be found. If compared to the other tour operators, Veratour, first of all shows a 'web and social' section including a wider variety of social media: a couple of blogs, a microsite, a contest site (Feel your Destination) ecc. The company is also showing more SNS accounts linked on the page (Google+ and Pinterest):

- Facebook - https://www.facebook.com/VeratourSpa
- YouTube - https://www.youtube.com/user/VeratourSpa
- Pinterest - https://www.pinterest.it/veratour
- Twitter - https://twitter.com/VeratourSpa
- Instagram - https://www.instagram.com/veratour_spa/
- Google+ - https://plus.google.com/+VeratourItVeratourSpa

Thus, none of the three tour operators has an english version of the website, or any other language version. This is quite weird for tour operators dealing with travellers and intermediaries from all over the world. For all the three websites, links to social networking accounts are hidden at the very bottom of the homepage. Apart for the connections to their sub-brands, if it is the case, none of the three websites has banners or links to other companies. Albatravel group's website, conversely, is in 13 different languages, but no mention is made on the site as for the social media. All the tour operators have a linkedin account which is not shown on the website homepage.

The above allows to conclude that even when the online visibility is at the top, the website could be used more efficiently to further improve the performance. But this, also suggests that maybe other social media such as social networking sites are mostly preferred by travellers as a source of information. It remains to investigate whether the online visibility is a consequence of the tour operators activity on social media, rather than an indirect effect of eword-of-mouth through user generated content.

5.3.2 Social media activity

The second stage of the analysis aims to investigate the tour operators' activity on social media in order to give an answer to the first research question: do tour operators use social media? Where for use, it is meant both the effective and efficient use and the extent to which it is used.

To this purpose, social media monitoring, through the tour operators' activity on social networking accounts and through Fanpage Karma social listening tool will be conducted.
For each social networking site on which all the seven tour operators manage an active account, i.e. Facebook, Twitter, Instagram and Youtube, a compared analysis of their activity will be showed.

The first SNS to be monitored is Facebook, which is, as said, the most used social networking site globally and the second most used in Italy, but by far the one offering the widest variety of features and applications: from pages, to groups[131], passing by events, marketplace, places, live streaming and so on.

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[131] Facebook Groups are used for collaboration and allow discussions, events, and numerous other activities. They are a way of enabling a number of people to come together online to share information and discuss specific subjects. Groups allow members to post content such as links, media, questions, events, editable documents, and comments on these items. They are increasingly used by clubs, companies and public sector organizations to engage with stakeholders, be they members of the public, employees, members, service users, shareholders or customers. Groups can have three different levels of privacy settings: "Open" means both the group, its members and their comments are visible to the public (which includes non-members) but they cannot interact without joining. "Closed" means the group and its members are visible to the public but their comments are not visible until the user has joined the group. "Secret" means that nothing can be viewed

The social network also offers a lot of features, free or paid (e.g. posts booster or targeted advertisements), to help companies building a community of trusty followers and market their travel business. Reviews, for example may be a useful free feature to gain brand reputation. Users can leave reviews with star ratings on the page. Potential customers will trust user created content more than any content produced directly by the company. Tour operators may quote customer testimonials in Facebook posts and share user images with accompanying reviews as captions. Live streaming videos from an event or from a holiday village or simply any other visual multimedia content can be used to attract the attention of social media users who are scrolling through their Facebook news feeds. Whereas competitions, exclusive discounts, and special offers to people who like the company's page and/or posts, or share posts on their newsfeed can help building a bigger community of followers so increasing the brand presence quickly.

This to say that Facebook, if used professionally and with a strategy behind may offer a valuable return in terms of visibility (brand recognition), engagement and brand reputation.

So, an insight into the tour operators' activity on the social network will tell us if the travel groups are using it at its best recognizing its potential both for B2B and B2C purposes.

Fanpage Karma offers a vast variety of analytics for some of the most used social networks (Facebook, YouTube, Twitter, Instagram, Pinterest and Google+) based on numerous key performance indicators for each SNS. At this stage of the research, only or mainly KPIs related to the tour operators' activity on SNS will be taken into account. For instance posts per day, number of posts per type (video, picture, link), comments on posts by fans, response time, service level, and so on. Some performance indicators may have not been included because of non-availability (n.a.) of data for all the tour operators brands.

The figure 5.6 below, shows a comparison among all the seven companies in terms of their activity on Facebook. The table is ranked based on the number of posts and refers to the first 28 days of the month of October. The *Page Performance Index* (PPI) is a combination of engagement and growth. The *Response Time* describes how long a page needs to respond to userposts. Fanpage Karma first calculates the response time for each userpost and then takes the median of all posts for the selected period of time. *The service*

by the public unless a member specifically invites another user to join the group. Source: <https://en.wikipedia.org/wiki/List_of_Facebook_features#Events>

level shows how many userposts get a reaction by the page in form of a like, a comment or deletion.

Fig. 5. 6 Tour operators' activity on Facebook

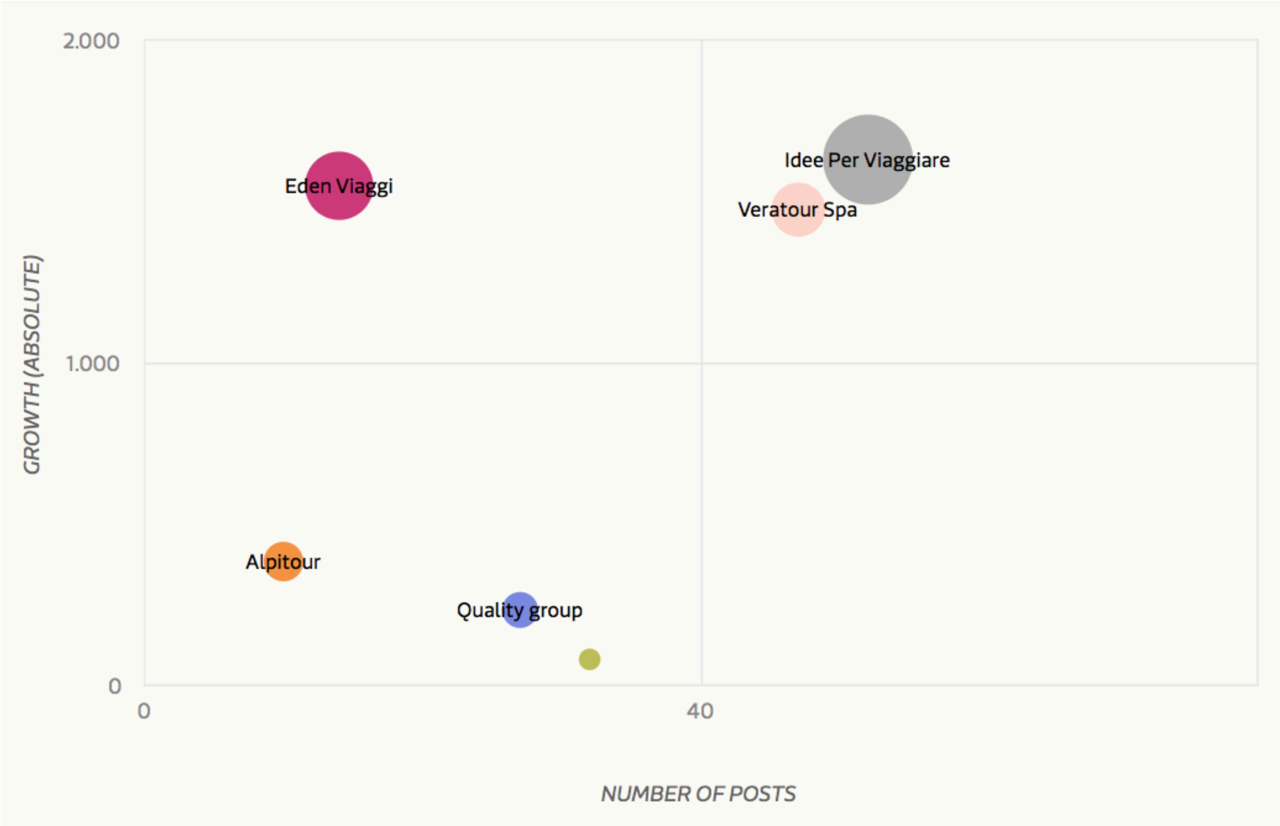
	Number of fans	Page Performance Index	Number of posts	Posts per day	Video-posts	Picture Posts	Link-posts	Comments on posts by fans	Posts by fans	Response time	Service Level	User posts per day	User posts total Reactions, Comments, Shares
Idee Per Viaggiare	306k	3.0%	52	1.9	6	40	6	0	3	n.a.	0%	0.1	1
Veratour Spa	141k	13%	47	1.7	2	39	6	0	2	n.a.	100%	0.07	1
Presstour	55k	2.0%	32	1.1	2	16	14	0	0	n.a.	n.a.	0	0
Quality group	85k	9.0%	27	1.0	9	12	6	0	0	n.a.	n.a.	0	0
Albatravel Group	1.7k	n.a.	21	0.8	4	16	1	0	0	n.a.	n.a.	0	0
Eden Viaggi	195k	5.0%	14	0.5	4	7	3	13	32	47 h	16%	1.1	160
Alpitour	94k	5.0%	10	0.4	1	5	4	22	33	0.8 h	6.1%	1.2	486
Average values	125k	6.2%	29	1.0	4	19	6	5	10	24 h	30%	0.4	93

Idee per Viaggiare, which is an emerging tour operator appears to be the most active group on Facebook with nearly two posts per day, the most of which are pictures. The brand also has the highest number of fans. However there is nearly no interaction with fans that post on their page or comment and/or react in any way. The tour operator brand with the highest interaction with its fans is again Alpitour, commenting 2 posts on three. The brand has a response time of 0.8 h, this means that they take less than an hour to answer to a fan's question which is a very good rate. However they have a lower service level in comparison to Eden Viaggi. The tour operator from Pesaro takes an average of 47 hours to answer to a question posed by a fan, which is an 'outrageous' amount of time, but reacts in any way (that may comprehend deletion!) to the 16% of its fans posts. The two tour operators, though, post approximately one post each two days, which is the lowest rate among all the seven brands. In general, those who post more and more often have the lowest interaction with fans.

If we cross the number of posts published by each travel group with the absolute growth in the number of fans, the bubble size measuring the total number of fans, Idee per

Viaggiare, Veratour are the top performers with the highest absolute growth per number of posts (Fig. 5.7). Albatravel does not show at all in the matrix and Presstours (the green spot in the matrix below), although it has been posting more than one post per day in the last 28 days, has had nearly no growth.

Fig. 5. 7 Number of posts per growth matrix



If we observe the tour operators' activity on Twitter the top players only slightly change. Veratour, Presstour and Idee per Viaggiare remain the most active brands on the social network with nearly two tweets a day in the last 28 days of October 2018. Alpitour is the group with the highest number of followers, retweets and likes, although they post only 0.6 tweets per day. The highest rate of conversations is registered for Eden Viaggi although the group has not at all been active on twitter during the last month. Conversations are determined by the ratio of @-reply tweets to all tweets, that means tweets that are interactions with other Twitter profiles. Albatravel has had no activity on Twitter on the last month. Apart fo the last two cited groups, all others actively use Twitter posting almost once a day.

Fig. 5. 8 Tour operators' activity on Twitter

	Profile Performance Index	Tweets	Tweets/day	Number of likes	Number of likes per tweet	Retweets	Conversations	Follower
Veratour Spa	4.0%	47	1.7	42	0.9	8	4.3%	8.2k
Press Tours	n.a.	46	1.6	28	0.6	7	0%	4.7k
IDEE PER VIAGGIARE	5.0%	42	1.5	53	1.3	14	0%	12k
Quality group	17%	26	0.9	38	1.5	8	3.8%	1.7k
Alpitour World	2.0%	18	0.6	152	8.4	57	0%	26k
Eden Viaggi	4.0%	2	0.07	0	0	0	100%	14k
Albatravelgroup	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Average values	6.4%	30	1.1	52	2.1	16	18%	11k

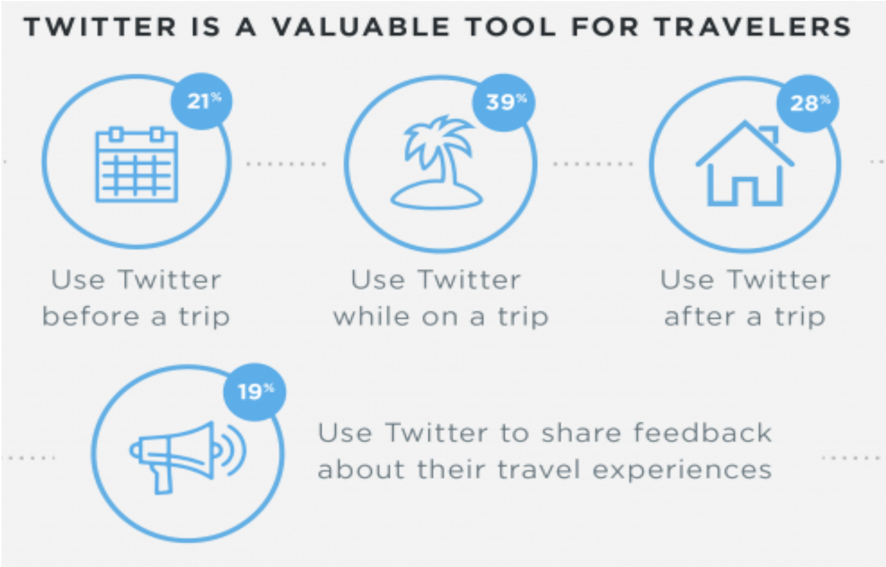
Twitter is an online news and social networking service on which users post and interact with messages known as "tweets". Tweets were originally restricted to 140 characters, but at the end of 2017, this limit was doubled[132]. Twitter has quickly become a powerful social media for travellers who are using it for tasks as researching destinations, connecting with their hotels and airlines for discounts, and so on. Travellers also use tools like hashtags to find information related to their destination, hotel, or airline of choice. Twitter Chats is another useful tool for travellers to gain valuable insight or simply ask questions directly on their profile in hopes of receiving some answers.

According to a study of Millward Brown for Twitter[133], individuals on Twitter use the social media platform during four stages of travel (Fig. 5.9) and the during the trip stage is the one in which travellers use it at most (39%).

[132] The length was doubled for all languages except Chinese, Japanese, and Korean. Source: <https://en.wikipedia.org/wiki/Twitter>

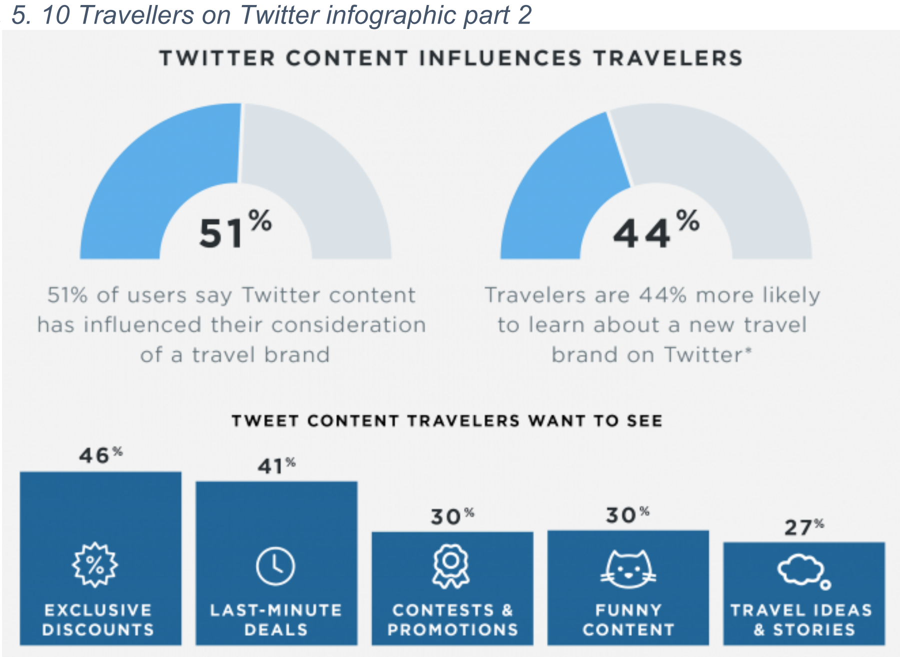
[133] The study consisted of a 10-minute online questionnaire completed by 1,349 U.S. online consumers age 18 or older who told they had traveled for business or leisure in the past 12 months. Millward and Brown compared Twitter users to users of other top social networks, and defined a user as someone who logged in to a platform at least once a month. Source: <https://blog.twitter.com/marketing/en_us/a/2014/three-new-insights-for-travel-brands-on-twitter.html> [Accessed: September 2018]

Fig. 5. 9 Travellers on Twitter infographic part 1



Because it's used at every stage of the travel process, Twitter can help brands develop strong relationships with travellers. According to the above study, which involves 1,349 US citizens, consumers are 44% more likely to learn about a new travel brand on Twitter than on the average social network (Fig. 5.10).

Fig. 5. 10 Travellers on Twitter infographic part 2



As said in chapter 1, YouTube is the most used social networking site in Italy, the second one after Facebook, globally. Video is an increasingly powerful tool for consumer engagement. Consumers are turning to sites like YouTube for the sole purpose of discovery, rather than starting their journey on Google or travel websites. Travel companies can profile their subscribers and analyse the types of content that drive subscriptions to their channel, converting passive viewers to active consumers. In fact, travel companies are more and more using YouTube data in order to successfully transition interest from social media to brand websites (Fig. 5.11). Also, travel companies, are using video content to showcase the sights and sounds of a particular place or destination, so involving travellers which are more and more seeking for new experiences.

Fig. 5. 11 Travel companies gaining traffic from YouTube[134]

Turning the attention back to the seven case studies, they seem to be generally quite active on YouTube. Alpitour World, which manages an account on YouTube since 2011 has the highest number of subscribers (3,233) and channel views (3,873,569). The group had more than 300 videos posted as at the end of October 2018 with little interaction from travellers. The highest number of video posted are in Idee per Viaggiare's channel. The group, which is on YouTube since the year 2009 has more video posted (481) than subscribers (359) and 427,676 channel views. The 'youngest' tour operator on YouTube is

134 Source: <http://hitwise.connexity.com/rs/371-PLE-119/images/Travel_in_2017_Report_Hitwise_UK.pdf?aliId=16152970> [Accessed: July 2018]

Albatravel Group which first opened an account on 2017 and has only 17 subrscribes, yet.

The eldest brand on YouTube is Eden Viaggi, with its 2,795 subscribers since the year 2007. Presstour manages an account since 2009, Veratour since 2010 and Quality Group just entered in YouTube in 2013.

Fig. 5. 12 Tour operators' activity on Youtube

	Total number of subscribers	Total number of channel views	Total number of videos	Number of total Video Views	Likes	Dislikes	Comments	Subscriber Growth (absolute)
Albatravel Group	17	607	13	0	0	0	0	n.a.
Alpitour World	3.2k	3.9M	303	283	8	0	0	90
Eden Viaggi	2.8k	702k	103	971	41	2	3	53
Idee per Viaggiare	359	428k	481	343	6	0	0	n.a.
Press Tours	366	136k	273	19	1	0	0	n.a.
QualityGroupTour	230	29k	51	0	0	0	0	9
Veratour Spa	2.7k	658k	78	751	7	0	0	-2
Average values	1.4k	832k	186	338	9	0	0	38

Finally, we are considering tour operators activity on Instagram. Not all the groups have an account on the social network. Quality Group and Albatravel have none. The latter is generally also the less active on all the other social networking sites. The top performer travel group, with the highest number of posts is Idee per Viaggiare. The brand posts approximately 1.2 pictures a day and has the best profile performance index (35%) which is a combination of engagement and growth.

The group is also following the highest number of instagramers assessing high visibility to its account. Anyway, once again in the ranking of the most followed tour operating brand, Alpitour is on top. In fact against their 0.8 posts per day they get the highest number of reactions by users, both in terms of likes and comments. Eden Viaggi follows closely the first ranking brand. All the five groups considered are in any case active on Instagram posting an average of 0.7 content per day.

Fig. 5. 13 Tour operators' activity on Instagram

	Follower	Following	Number of Posts	Posts per day	Likes	Comments	Post Interaction	Profile Performance Index
Idee Per Viaggiare	18k	3.4k	33	1.2	7.0k	99	1.3%	35%
Alpitour World	90k	82	21	0.8	25k	258	1.4%	11%
Veratour Spa	19k	1.8k	14	0.5	5.8k	212	2.3%	20%
Presstour	3.2k	427	13	0.5	952	13	2.4%	n.a.
Eden Viaggi	46k	249	13	0.5	8.8k	200	1.5%	11%
Average values	35k	1.2k	19	0.7	9.6k	156	1.8%	19%

Instagram is often the first port of call when it comes to planning a trip. More and more tourists are demanding for authentic travel experiences an the most effective way to communicate the notion of a tourism experience at a destination, is to provide visual cues that stimulate the imagination and connect with potential tourists in a personal way (Ye, Tussyadah, 2011). Travel is one of the driving themes of Instagram; in fact, there are over 313 million posts on Instagram with the hashtag #travel. In June 2018, Instagram announced that they had reached 1 billion active users and there were 25 million active business profiles in November 2017.

The social platform has recently introduced some new features like video chat, a brand new video channel, music and questions for Instagram Stories, and an updated explore page. For instance, Instagram's very own video platform IGTV launched in June stands out, compared to YouTube because it is only for vertical videos easily made and uploaded from the smartphone. Videos may be 10 minutes long, for most accounts, and up to one hour for larger or verified accounts, which opens up a world of video opportunities for travel (and other) companies allowing Instagram to compete with YouTube.

To conclude this analysis of the tour operators' activity on the social networking sites that are most related to travel and tourism, it may be said that the groups manage their accounts efficiently posting regularly. However, in some cases they lack in the interaction with users, i.e. it's like if they post without caring about the effects of what they post.

5.3.3 User Generated Content analysis

In this last step of the research the impact in terms of brand awareness and reputation of the tour operators' activity on social media will be investigated. In particular, using the analysis platform Social Mention, users generated content will be crawled in order to assess the stength, passion, reach and sentiment of each of the seven tour operators brands.

The *strenght* is the likelihood that a brand is being discussed in a social media (phrase mentions within the last 24 hours divided by total possible mentions). The *sentiment* is the ratio of mentions that are generally positive to those that are generally negative. If that ratio shows 0:0 it means that all mentions are neutral. *Passion* is a measure of the likelihood that individuals talking about a brand will do so repeatedly. Few unique authors posting more content about the same topic make a higher passion score. *Reach* is a measure of the range of influence. It is the number of unique authors referencing a brand divided by the total number of mentions.

Social Mention is a social media search and analysis platform that aggregates user generated content from across the universe into a single stream of information. It allows to easily track and measure what people are saying about a company, a new product, or any topic across the web's social media landscape in real-time. Social Mention monitors 100+ social media properties including all the most used social networking sites, bookmaks, blogs, etc. Data retrieved from Social Mention scan all UGC about that string at anytime.

Social mention search is based on keywords or word strings and does not allow a multiple and comparable search as is the case of Fanpage Karma. However it allows advanced searches whereby the enquiry may be refined adding or excluding some words from the search.

When searching the word Alpitour among the user generated content on Social Mention, for instance, I had to exclude the word Pala since many mentions were related to the Pala Alpitour stadium in Turin which is sponsored by the tour operating group. The searching process for multiple word names was quite tough and tricky, since in many case it retrieved non relevant results. For instance the search for "Eden Viaggi" retrieved tweets about a Job advertisement while the search by "Edenviaggi" returned results of mentions regarding the Italian tour operator.

Since the social analysis platform Socialmention does not unveil how it works, above all how it extracts the mentions and based on which time frame, the reliability of the results returned, in terms of quantity and comprehensiveness, is not to be verified. In fact, the number of mentions retrieved is quite low. As for the content, I double checked all of the mentions retrieved in order to assess whether they were really mentioning the tour operator and, if the case, excluded those that were not.

Anyway, taking for granted the fact that the outputs are ratios which may possibly not vary adding further content, we will use information contained in table 5.5 as a means to compare the brands reputation.

Table 5. 5 User generated content analysis about the seven tour operating brands

BRAND	STRENGTH	SENTIMENT	PASSION	REACH	SOURCES
ALPITOUR world	1%	1:0	22%	28%	Tw, Reddit, Blog
EDEN VIAGGI	0%	0:0	54%	10%	Tw
VERATOUR	2%	0:0	0%	2%	photobucket
PRESS TOURS	0%	0:0	33%	4%	Tw
IDEE per VIAGGIARE	0%	0:0	0%	3%	Tw
QUALITY GROUP	0%	0:0	0%	6%	Tw
ALBATRAVEL group	0%	0:0	0%	8%	Tw

The search on Alpitour has returned the highest number and widest variety of sources mentioning the brand. It is the only enquiry that retrieved a Blog amidst the sources.

Focusing exactly on Alpitours' social media strategy, the article may be worth citing: " Digitally, Alpitour provides its packages on an online website, but the most effective promotion is done via social media. One of the most innovative way of engaging the customer is via Spotify. Alpitour has a Spotify channel in which it displays several playlists, all with different themes aimed at creating a pre-, post- or on-site atmosphere of the journey. For Alpitour 70th anniversary, for example, they created a playlist named #ALPI70, where the most popular Italian songs linked to holidays have been gathered. This innovative approach can be seen as a special effort towards the customer, who feels well taken care of and deeply involved into the tour operator service. (Alpitour.it, 2018)"[135]

Most of the other content retrieved, from the search of the seven brands names came from Twitter and most of the tweets were in Italian. Eden viaggi is the tour operator with the second highest number of sources mentioning the brand.

Generally, the sentiment about the seven brands observed is neutral, thus giving a ratio 0:0. The only exception is Alpitour with one positive mention making its ratio 1:0. This may tell that the brand reputation is generally good and not affected as a whole by negative mentions. About this a point needs to be made. Socialmention monitors more than 100 social media among which Tripadvisor is not mentioned. However, when scanning Tripadvisor reviews and forums to assess the online visibility of tour operators, a number of negatively related mentions were to be found concerning all of the brands.

[135] Source: <https://customerengagementmanagementintourism.wordpress.com/2018/10/07/digital-and-physical-arenas-an-example-of-alpitour-best-italian-tour-operator-2014-2017/> [Accessed: October 2018]

5.4 Conclusion and implications

The first impression I feel to write as a conclusion to this study, is that social media offer a vast opportunity of analysis to researchers. The overwhelming amount and variety of data, available for free on the net, open uncountable possibilities of in depth analysis about many fields of research, that would have been unconceivable only a decade ago. However the pros may also hide cons. If the 'big' data are a strength in terms of quantity and variety, sometimes the reliability of the sources may be difficult to assess. Also, the huge amount of data available may make it difficult to find a way out and organizing results may become tough. That said, I think that the trick is to, always, double check the reliability of the sources taking nothing for granted or as absolute truth.

When we decide to rely on analytic tools, for example, the important thing is not the trueness and accuracy of the count of followers or of posts but the relative overview we can get by the data retrieved. Other researchers may question my opinion, of course, but it allows me to explain some of the choices I made to build this piece of research on the tour operators' use of social media and on the impact of their activity.

Answering to the first research question, we may certainly say that tour operators most actively manage their social media accounts. They nearly all post content every day on at least 4 of the most used social networking sites: Facebook, Twitter, YouTube and Instagram. They also have accounts on Pinterest and Google+ but with mainly little activity. They then have a Linkedin account which is used for job advertisement and other professional purposes.

Alpitour, which is today the biggest tour operating group in Italy, after its recent deal with Eden Viaggi, is the brand with the highest number of followers or subscibers in all social platforms observed, but one, Facebook. At the end of 2017 the group invested in a new Chief Marketing and Digital Officer and pooled marketing, web and CRM divisions into a unique one, with the purpose to boost their digital area to enhance their customers' user experience[136].

[136] Source: <https://www.alpitour.it/Area-Stampa/comunicati/2017/Gruppo/-/media/726F799A520F4717BC72DC7543A6BB4E.ashx> [Accessed: October 2018]

However on most of the social platforms the interaction of the brands with users is not satisfying. The response time on Facebook, for instance, or the reactions and comments to the users' posts may absolutely be improved.

Also, their websites are not optimised for the global market. Although the groups deal with travellers from all over the world their websites are only in Italian. Albatravel group is the only tour operator offering a website edited in 13 different languages. In addition, the links to their social media accounts are mainly hidden at the very bottom of the page or in the case of Quality Group and Albatravel not shown at all. This may mean that they do no longer believe in the website as a communication tool, shifting all activity on social media and keeping the site just for their inter-firm relations with the Italian travel agencies. Anyway, a traveller may be attracted through social media to visit the groups' home page and need to abandon it immediately.

With regard to the impact of the tour operators' activity on social media, which is the focus of the second research question, the general online visibility is satisfying, although as said, much more may be done. Alpitour World and Eden Viaggi, once again, are the leading groups in the ranking of the TOOVI index. As for the brand reputation, the user generated content analysis through Social Mention did not returned many mentions, making the comparison among brands less reliable. In any case the sentiment about the seven brands is generally neutral, i.e. with a ratio 0:0, not positive, nor negative.

Tour operators' digital managers should not ignore the power and benefits of interacting with the travellers on social media in order to reinforce their brand recognition, awareness and reputation.

5.5 Limitation and further research

The *first* limitation of the research is in terms of population observed. Social media analysis and monitoring, considering the huge amount of data available is much time consuming and extending the research to all the Italian tour operators would have asked more resources. Further research may be applied to a different group of tour operators allowing a comparison with the one observed in the present study.

The *second* limitation is in terms of the choice of social media listening and monitoring tools to be used for the analysis. There are so many platforms on the net, both free or paid, that it is a hard task to choose the best one. The two which have been used in the present work as a support to the analysis were first of all suggested by literature on travel and tourism industry and then tested. But anyway, the feeling about Social Mention, being their 'how it works' not clear, made it a little less trustworthy. Generally speaking, there is no doubt about the fact that in the ocean of possibilities offered by social media there is or there will be soon some more performing tools to use.

The *third* limitation emerged from the findings and concerns the fact that information about the groups' organigram, in particular about the presence or not of a digital division, would have helped understanding. Also, knowing if the tour operators have implemented a social media strategy and having the possibility to analyse it would have given an additional perspective to counterweigh the results obtained. As said at the beginning of this work retrieving information and data directly from the tour operators has not been possible. Future research on the travel suppliers perspective is certainly advisable. Research on this field has received very little attention as yet and is at its embryonic stage.

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Chapter 6

CONCLUSION

General conclusion and implications

Trying to fill a literature void as revealed by the systematic literature reviews, the first aim of the present work was to analyse the use of social media by two opposite sides of the tourism supply chain. A predominantly BtoB industry (tour operators) and a BtoC industry (hospitality). Two types of tourism businesses which are apparently very different and have diverse relationships with tourists. Hospitality companies are very closely linked to the tourists' behaviour and to their increasing use of social media at each stage of the consumption process. Besides, tourists play a very important role in the accomodation services production, acting inside the provider's sphere and even co-creating value. The role played by tourists and their being always and instantly connected is affecting the hospitality industry so much that companies may not avoid interacting with them.

Although the results of the empirical research on social media in the hospitality industry reveals a very positive impact of ICTs on the accomodation sector, they conversely showed an important gap between providers and consumers in the use of social media.

On the other hand, tour operators, acting in a mainly business to business context have traditionally been less and indirectly influenced by tourists' travel behaviours. Tour operators control a large part of the tourist experience given their volume, their influence in the image creation process and their negotiation power with the different agents in the destinations. They also exert a predominant role in fixing the prices in the tourism industry and in particular, in the European mass tourism industry, the tour operator oligopoly has brought to price and offer standardisation. However, in the last decade, the distribution landscape and the tour operator industry have gone through significant changes. ICTs have introduced complexity adding layers of intermediation or disintermediation. This means a significantly reduced role of traditional intermediaries in the tourism supply chain, due to the introduction of social media that enable consumers to directly deal with suppliers and on the other side, the tour operators empowerement to act in a B2C context selling directly to travellers, bypassing travel agencies. Thus, the distance between tourists and tour operators is narrowing. As for the hospitality industry, the results of the empirical research shows that the impact of social media on the sector is overall positive but tour operators use social media much more intensively than accomodation pratictioners. Besides, the interaction with tourists is still quite weak.

Bearing in mind the main aim of the present work, it may be said that the two industries in our samples, although acting from different sides of the tourism supply chain, have in common the need to enhance their interaction with tourists on social media. In particular, both hospitality managers and tour operators should improve the social listening and never forget to answer to an information request and possibly reduce the response times. Social media are giving tourism consumers a previously unimaginable power to influence the market and no provider along the tourism supply chain should underestimate it.

On the other side, the big difference between the observed hospitality businesses and tour operators, as arising from the work, is that travel companies have better awareness and higher knowledge of social media, thus their online presence is stronger and more organized. Tour operators mainly manage more social networking accounts (at least 5 among the most common ones) if compared with the medium adriatic accomodation companies, that generally only use facebook and post with higher frequency.

This suggests additional implications for hospitality managers. First of all they should acquire social media skills, invest time if not money in building expertise to increase and organize their social media presence. Possibly, planning and scheduling the posts on different social media or even implementing a social media strategy. The medium adriatic accomodation companies, in this case, are really lagging far behind tourists when it comes to using social media and considering how digital and instantly interconnected the nowadays society is, it's high time to catch up.

The empirical researches in the present thesis certainly contribute to filling the literature gap that emerged from the systematic literature reviews. On the one hand, the analysis on the extant literature about the BtoC industry revealed that while there is a growing body of research on social media in hospitality and tourism journals, bringing to an overload of publications on the topic, very few articles do concern the suppliers perspective and in particular the impact of using ICT and social media on the accomodation firms. On the other hand, tour operators industry and their use or awareness about social media has received very, very limited attention by scholars as yet.

That said, the present work offers a useful insight about social media from the tourism providers point of view in both the BtoC and BtoB contexts of the supply chain, thus, adding an important brick to the void that currently exists in this crucial topic for tourism: the social media awareness and use by tourism providers.

It goes without saying that the originality of the thesis is mainly concentrated on offering a perspective on research about social media, that has received very little attention. And in filling a literature gap, the research also allows the comparison between different industries acting in distinct contexts of the tourism supply chain.

Further research expanding the breadth and depth of inquiry may be suggested. Other kind of providers of the tourism supply chain, such as restaurants or travel agencies may be investigated and the areas of research may be enlarged covering the whole italian territory.

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