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Inbound Tourists in Italy: An Analysis of Individual Satisfaction in the Main Italian Destinations

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ABSTRACT

The present work aims at bringing about an empirical analysis of the inbound tourism market in Italy, from the perspective of the individual tourist. We analyze more than a million satisfaction judgments, retrieved from the extensive survey by the Central Bank of Italy, spanning the period 1997-2013, focusing on the visitors' socio-demographic and trip-related characteristics Moreover, following the Multi-Attribute Level approach and the Importance-Performance interpretative framework, satisfaction is proposed as a measure to evaluate tourism areas' attractiveness and the performances of destinations' assets.

Keywords: Tourist Satisfaction; Italian Destinations; Tourist Expenditure; Length of Stay; Inbound Market

In questo lavoro viene presentata un'analisi empirica del mercato turistico in entrata in Italia dalla prospettiva del singolo visitatore. Più di un milione di dichiarazioni di soddisfazione, tratte dalla vasta indagine alle frontiere pubblicata da Banca d'Italia che copre il periodo 1997-2013, sono analizzate concentrando l'attenzione sulle caratteristiche socio-demografiche e situazionali dei viaggiatori. Inoltre, seguendo l'approccio "Multi-Attribute Level" e la cornice interpretativa "Importance-Performance", la soddisfazione viene proposta quale misura per valuare l'attrattività delle destinazioni turistiche e le performance degli asset delle principali province italiane.

Keywords: Soddisfazione dei Turisti; Destinazioni Italiane; Spesa Turistica; Durata del Soggiorno; Mercato in Entrata

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Introduction

The international market represents a great source of opportunities, for a country like Italy, having an inherent vocation to tourism and living hard times with reference to domestic consumption (see IMF, 2016a). If the pool of potential international visitors is huge, the competition against other destinations worldwide is fierce. Whence the importance to implement tourism development strategies is able to increase the Italian competitiveness on the international stage. The knowledge of both the characteristics of the market and the performance levels of the main supply aspects constitutes a useful informative basis from which effective a strategic management of destinations should start planning interventions. This is especially true in a composite and heterogeneous country like Italy, where tourism policies and interventions are determined at the regional level, but each administrative region includes very different provinces, each shaped by its peculiar history and traditions.
The extant literature proposes various conceptual frameworks to approach the study of tourist destinations from either the production-oriented perspective or the consumer-oriented point of view. With reference to the former, among the most renowned conceptualizations we find the cluster approach (e.g. Thomazi, 2006), the systems framework (e.g. Baggio, 2008), the definition of destinations as industrial districts (e.g. Petrić & Mrnjavac, 2003). Regarding the consumer-oriented perspective to destinations, we can mention the social construct approach (Iwashita, 2003) and the network framework (e.g. Rocks et al., 2005). Although each of these conceptual frameworks characterizes tourist destinations differently, the idea that "the main point of reference for detecting tourist destination is the subject interpreting the tourist experience" (Lanfranchi & Giannetto, 2010, p. 77) is broadly shared. Consistently, in the tourism literature the consensus on the fact that tourist satisfaction judgments constitute an especially appropriate variable for measuring the destinations' performance is about unanimous (Cracolici & Nijkamp, 2009; Fuchs et al., 2002). In fact, tourist satisfaction is widely recognized to be a crucial factor of competitiveness, because it strongly influences the tourist behavior (Chen & Chen, 2010; He & Song, 2009), for instance in the choice of the destination and the purchase of further products and services (Chi & Qu, 2008).
According to the Multi-Attribute Level approach (Kozak, 2003; Middleton & Clarke, 2001), overall satisfaction is determined by attribute-level evaluations, which have been found to explain a significant quantity of the variability of the overall satisfaction. In fact, the tourism fruition is lived as a multifarious and holistic experience, made possible by many different aspects of the local supply (Alegre & Cladera, 2006; Alegre & Garau, 2010; Yoon & Uysal, 2005). As a consequence, a destination founds its attractiveness on the competitive advantages it is able to create on certain tourism aspects, with reference to which the tourist satisfaction is particularly high (Enright & Newton, 2005), according to the Importance-Performance approach to destinations competitiveness (Deng, 2007; Enright & Newton, 2004).
There are two main conceptual frameworks to measure customer satisfaction. In the service quality context, Parasuraman, Zeithamd Berry (1985), theorized that satisfaction (or dissatisfaction as it opposite) is the positive (or negative) difference

between the expectations, elaborated by the consumer before consuming the good or service, and the perceived performance of the latter, after consumption. The tourism literature about the leisure segment incorporated this conceptual definition in the HOLSAT (holiday satisfaction) model (Truong & Foster, 2006). Conversely, the perceived performance-only approach, conceived by Tse and Wilton (1988), directly identifies satisfaction with the consumer's assessment of the service or product's performance. The thesis underpinning this approach concerns the redundancy of measuring both expectations and perceived performance through a survey (Neal & Gursoy, 2008). It is also free from the many drawbacks of the expectations-performance conception, highlighted by the literature especially about the tourism sector. Thus, we employ this second method.

Therefore, the aim of this work is bringing a preliminary informative contribution to the knowledge of the main features of the market of international travelers visiting Italy, as well as the performances of Italian destinations, as perceived by foreign tourists.

Given the importance of the "tourist experience" for measuring the destinations' performance, we analyze more than a million satisfaction judgments, retrieved from the extensive survey about international tourism, carried out since 1997 by the Italian Exchange Office and since 2008 by the Central Bank of Italy, through 145,000 yearly face-to-face interviews at 82 border points. We limit the analysis to respondents who stayed in hotel structures, because they represent the demand macro-segment with the highest average daily expenditure. This way we exclude also cross-border workers' evaluations. So the final dataset is composed by 1,135,214 observations, collected since 1997 to 2013 (we stop at 2013 due to the timing of data publication and processing).

Although the aim of such international tourism survey is computing the national balance of trade (the difference in value between a country's imports, including outbound tourist expenditure, and exports, comprising inbound tourist spending), so the main focus is on tourist expenditure, it includes also a section about tourist satisfaction, socio-demographic and trip-related variables, which can be very useful to destination management and policy-makers. In particular, these survey data allow examining the empirical distribution of satisfaction judgments with reference to the visitors' subjective and situational characteristics. Such a comprehensive database permits to draw some insights about both tourist expenditure and length of stay. Moreover, the possibility to analyze tourist satisfaction with many different aspects of the tourist experience, both tangible and intangible, provided either by private companies or by the public sector, assents the adoption of a holistic approach.

To the best of our knowledge, this is the first time that this survey is examined at the micro-level and through a holistic approach. Our holistic approach is another element of originality of this work, as the marketing & management theoretical tourism literature has long invoked the need for such an approach (Pizam et al., 1978), but most empirical studies could not implement it, due to the difficulty of carrying on a consumer survey as comprehensive and extensive as required. Consistently with Kozak (2003), we employ satisfaction as a measure to evaluate tourism destinations' attractiveness and the performances of their assets, according to the Multi-Attribute Level approach and the Importance-Performance interpretative framework.

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The present work proceeds as follows. Section 1 describes the survey by the Central Bank of Italy. Section 2 examines the composition of the international tourism market, the average tourist expenditure and length of stay. Section 3 analyses tourist satisfaction. The last section is devoted to some concluding remarks.

1. Data and Methodology

1.1 Data description

Many central banks or national institutes of statistics in the world collect information about tourist flows and expenditure, for computing the national trade balance. For example, with reference to Europe, this information is managed by the central banks of Austria, Belgium, Czech Republic, France, Germany, Greece, Hungary, Italy, Poland, Portugal, Slovenia, Spain, Turkey, United Kingdom; and by the national institute of statistics of Denmark, Estonia, Netherlands, Norway, Romania, Sweden. All the listed institutions gather data about imports and exports of tourism-related services and products, through sample surveys at the borders. Therefore, the information of main interest concerns both inbound and outbound tourist spending. Generally, each country/institution chooses which secondary variables to collect, as they are not necessary for computing the national trade balance. In the Italian case, secondary data are especially important, because they include satisfaction statements about many aspects of the tourist experience. The questionnaire is proposed to international travelers at the end of their journey at border points and includes 48 questions, concerning assessments of destination’s attributes, socio-demographic variables, motivations, expenditure and trip-related variables.
With reference to satisfaction statements, respondents are required to evaluate, on a scale ranging from 1= very bad, to 10= excellent, the following nine assets of the visited province:

- the courtesy of local people,
- the artistic endowment,
- the environment,
- hotel structures,
- food and restaurants,
- the price level,
- the variety and quality of goods in shops,
- tourist information,
- the security level,
- the overall experience.

The socio-demographic characteristics of respondents are also recorded:

- age,

- sex,
- origin,
- professional condition,

as well as with trip-related variables:

- vehicle,
- journey purpose,
- year period,
- average daily expenditure (net of the cost of reaching the province),
- number of nights spent in the province.

These attributes are related to the production, the consumption and the experiential dimensions of tourism, all fundamental facets of tourism destinations. Tourists are also asked for an overall evaluation of their tourist experience.

1.2 Data quality

We can exclude that the survey is globally affected by serious sampling error, as the Bank of Italy estimated it to be less than 1%, based on 1,550,000 yearly counts of people passing the 82 border points. We can assume that no bias is introduced by drop-out, that is just the 2%, and non-response, that is just the 5%.
Nonetheless, the rates of non-response on each single destination's attribute range from a minimum of 2%, to a maximum of 24%. So we test for the presence of self-selection bias through a chi-squared test, allowing to exclude response bias with a significance level lower than 0.001. Given the absence of this bias, the large size of the dataset and the fact that the sampling procedure is stratified based on both time and space, we expect that the respondents' socio-demographic characteristics approximate those of the population. While for tourist expenditure and length of stay data are generalized to the whole population, multiplying the sample values by the inverse probability of sampling.
These data allow to shedding light on valuable aspects for administering and marketing Italian, thanks to variables that are not collected in other official surveys about the tourism sector. Many examples are possible. The Italian National Institute of Statistics' (ISTAT) accommodation survey (movements in accommodation establishments) records neither the travel purpose (business, leisure etc.) nor the socio-demographic characteristics of travelers. While the ISTAT's tourism demand sample survey (Italian trips and holidays), deals only with the inbound segment and data are disaggregated by region (NUTS2) instead of by province (NUTS3). On the contrary, tourism policies implementation usually occurs at county or city level. Since the 1990s, in Italy the responsibilities for both destinations development and marketing actions have been transferred from the central government to the Administrative Regions (NUTS2 areas). These, in turn, delegate many functions to the counties ("Province", in Italian, that is to say NUTS3) or municipalities. The latter ones deal with the organization and

coordination of promotional activities, as well as of the maintenance and management of the local attractions and – in general – of the environment.
Finally, none of the mentioned surveys by ISTAT gathers information about the tourist expenditure at the destination level, as they measure the tourism production only through arrivals and overnights. Moreover, in the case of the census survey these aggregate figures tend underestimate the actual tourism demand, mainly due to fiscal concerns (Guizzardi & Bernini, 2012). On the contrary, the number of arrivals and overnights (as well as length of stay) retrievable from the survey by the Central Bank of Italy is gathered from the demand side, so that it does not suffer from this kind of bias. It is also worthy of note that the spending data available in the Central Bank of Italy's dataset are the only measure fully consistent with the definition of tourist expenditure. In fact, other measures of the aggregated tourist spending – i.e. collected through household surveys – do not allow to distinguishing between the share specifically spent for tourism activities and that for other non-tourism-related consumption. As an example, the cost of meals at restaurants is recorded without considering whether a meal was eaten during a holiday or not. This fact makes tourist expenditure as computed in official surveys a lower bound estimate of the true spending level.

2. Market characteristics: tourist expenditure and length of stay

As shown in Figure 1, most of the international respondents (72%) travel to Italy for leisure, 17% for business or congresses. Religious tourism represents only the 0.42% of interviewees, a possibly surprising datum, considering the presence of the Vatican and many places of worship of saints, on the Italian territory. Among the top ten provinces, religious tourists constitute the 1% of visitors only in Rome.

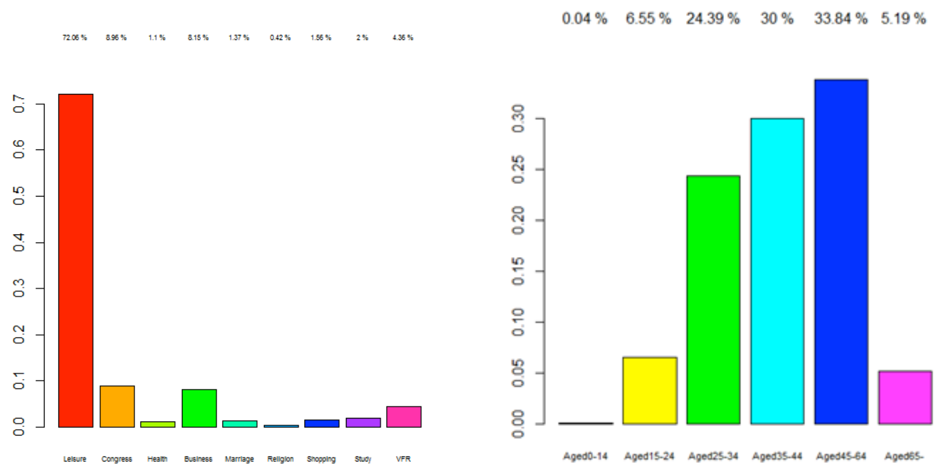

Figure 1: Percentage of respondents by travel purpose and age (full sample), 1997-2013.
Source: the Authors.

The most numerous age class, of international travelers to Italy, is that between 45 and 64 years, closely followed by that between 35 and 44 and that between 25 and 34.

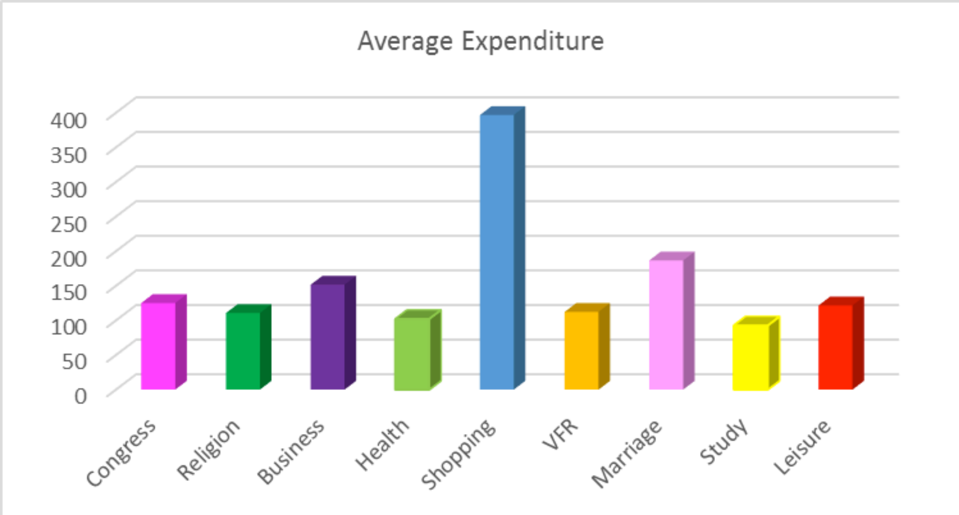

Figure 2: Average daily expenditure by purpose of travel, 1997-2013.
Source: the Authors

Overall, the average daily expenditure is 132€ per person and the median is 84€. As displayed in Figure 2, on average foreign tourists coming in Italy for shopping spend the highest amount of money, recording a mean of 397€. This datum can be expected because of the nature itself of the travel purpose. Visitors in honeymoon show the second highest average daily expenditure, equal to 187€, followed by business and congress travelers, for which the mean reaches 152€ and 125€ respectively. The high amount spent by just-married couples can be explained by the "once in a lifetime" characteristic of a honeymoon. International students spend on average just 93€, the lowest figure followed by that of visitors coming for healthcare (102€) and for religious tourism (111€). Also this evidence is not surprising, in fact students, commonly without a job, tend to stay longer than other tourists (see below) and if they lodge in hotel it is likely that they cannot afford to spend much money for long time periods. Religious and healthcare tourists might lack the time to spend money, as they should be busy in worship activities or in getting the needed cares.
Turning to the analysis of tourist spending by destination, as shown in Figure 3, among the first ten main tourist destinations, Rimini appears the most "profitable" one from the perspective of destination managers, with an average expenditure of 224€, well above the general mean. We highlight this finding because it seems to contradict the common perception of Rimini as a cheap destination, but it can be explained by the very high share of visitors coming for shopping (e.g. wealthy Russian travelers). Milan, the main Italian fashion district, is the second city with the highest average daily expenditure per person (201€), followed by Rome, with 171€. Verona appears the least remunerative destination.

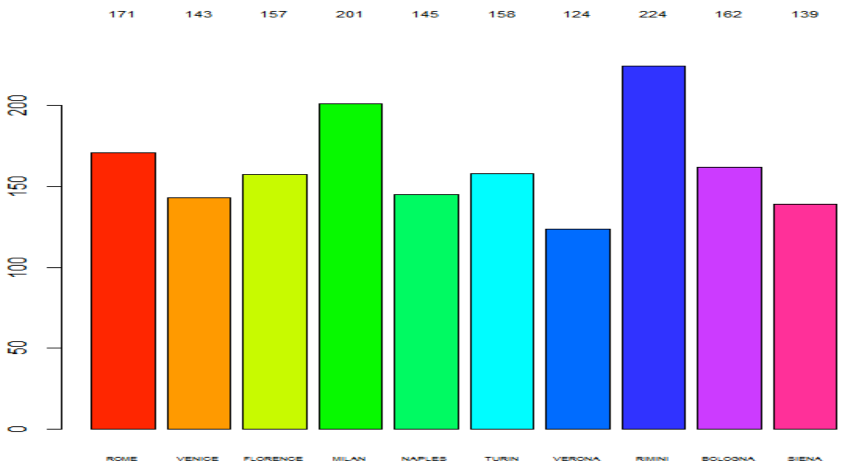

Figure 3: Daily average expenditure in the first 10 provinces for number of respondents, 1997-2013.
Source: the Authors

Foreign travelers visiting Italy spend 15 nights, on average, in the destination province. The median length of stay is 7 nights, so the distribution of overnights is a quite asymmetric and most of the respondents spent just a week in the chosen province. The average number of nights spent in the destination municipality is 4 and the median is 3, as most of the tourists stay in one or two municipalities during their journey within the main visited province.

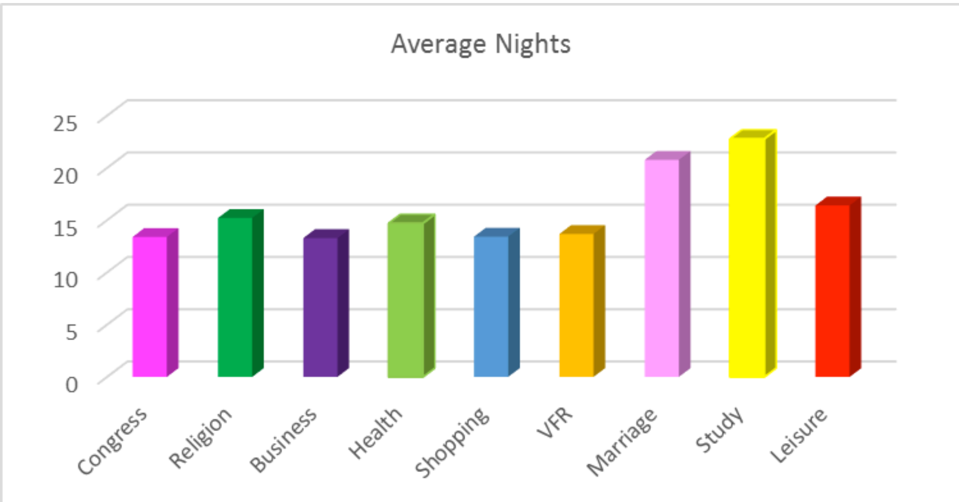

Figure 4: Average length of stay by purpose of travel, 1997-2013.
Source: the Authors

Figure 4 confirms that, on average, students spend the longest time period in Italy, compared to visitors coming for other purposes. If 23 nights could seem quite a short period for studying abroad, it should be considered that we are examining only travelers who lodged in hotels. Students staying in hotels are likely to be in Italy for courses of Italian language, summer schools and short-term learning programs, while those who attend longer study programs generally find a cheaper accommodation (e.g. renting a room). As expected, also honeymoons last longer than the average trip (with a mean of 20 days). The mean duration of leisure vacations is 16 nights. The travelers who spend the shortest time period in Italy came for business, congresses or shopping (with an average number of nights of 13).

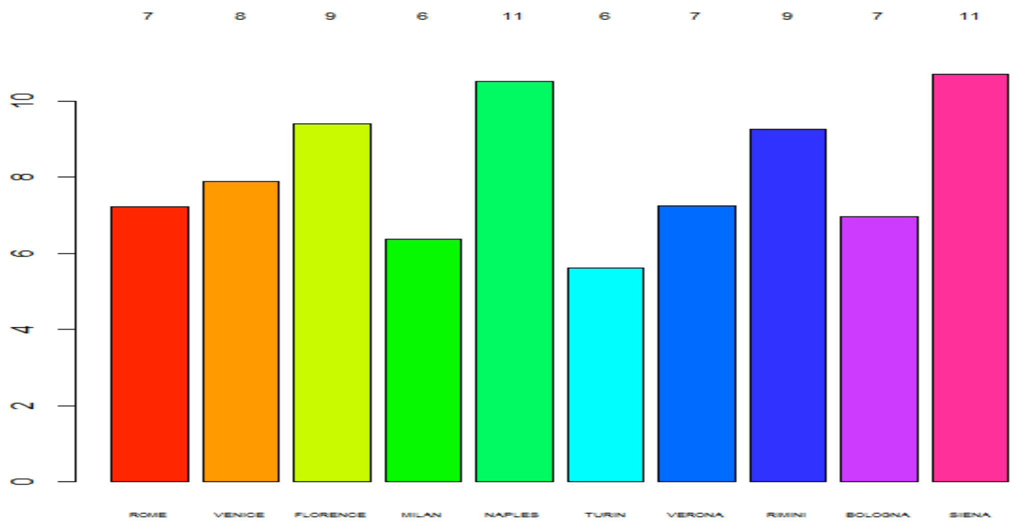

Figure 5: Average number of nights spent in the 10 main destination provinces, 1997-2013.
Source: the Authors

Figure 5 displays the average length of stay in the 10 main provinces. The first tied destinations for number of nights are Naples and Siena, where the mean is 11. Both Florence and Rimini, though being very different destinations, record 10 days (number of nights plus 1) of average tourist stay. As expected, the most “business-vocated” destinations (above all Milan and Turin), are the ones where international tourists spend the shortest time period, on average.

3. Inbound tourist satisfaction

3.1 Tourist satisfaction with destinations’ attributes

Switching to the analysis of tourist satisfaction, the top section of Table 1 reports the median and standard deviation of international tourists’ satisfaction statements, referred to the whole sample. The variability of visitors’ judgments is very low. The least variable statements concern overall satisfaction, the most variable ones are about prices and information. The relatively high dispersion of tourist satisfaction with prices can be explained by the different perception, of the same price level, that travelers coming from different countries should have, due to the diverse exchange rates. The median overall evaluation is 8, the same for shopping, information, hotels, security and courtesy. The price levels appear slightly less satisfying, suggesting that indeed Italy is not such a cheap country as many foreigners may expect. Conversely art, food and

environment attain a median satisfaction judgment of 9, not surprisingly, considering that the Italian artistic and naturalistic heritages, as well as its cuisine, make it famous all over the world.
The overall satisfaction is one point higher, again with reference to the median, for children, visitors aged 65 and more, dependent workers, housewives, retired and unoccupied people, but also for religion tourists, travelers with healthcare purpose and couples in honey moon. This evidence may suggest that the Italian tourism supply exceeds the expectations of foreigners travelling to the country for purposes different from those more properly tourism-related, so they may get a satisfying tourist experience that maybe they did not actively searched for. Congress participants and businessmen are little less satisfied with art than other visitors, possibly because they could lack the time to enjoy the very rich art endowment of the peninsula. Conversely, just married couples and travelers for shopping appreciate art the most, rating it 10 over 10.
Tourist information is considered more appropriate by health tourists and travelers visiting friends and relatives, market segments for which it should not be as relevant as, for example, for leisure tourists. Housewives and retired visitors, as well as health tourists, rate hotels and security higher than other groups. Also students and travelers in honey moon rate the security level 9. Food is a bit less satisfying for foreign people with shopping purpose, than for other typologies of tourists. Travelers for business and congresses rate environment one point less than others, maybe because they visit business districts that are more busy and polluted than less business-intensive provinces. Conversely, health travelers judge environment excellent, as health tourism is often concentrated in thermal areas, generally located in beautiful natural landscapes.
Children, elder travelers, factory and dependent workers, students, housewives, retired and unemployed people, religious and health tourists, just married couples and travelers visiting friends and relatives tend to find Italian residents more courteous than tourists with other characteristics do. In general, male visitors evaluate the friendliness and hospitality of local people more than female tourists. Just married couples and travelers for shopping tend to find the Italian supply less cheap than other categories, maybe due to the higher absolute expenses they incur, due to the purpose itself of the journey.
From Table 1 it emerges that eldest people, housewives and retirees, likely constituting a large share of the health tourist segment, tend to express higher satisfaction statements than other groups. This can be due by both their especially positive subjective attitude, or by the actually higher performance of tourism products and services having this market segment as specific target, thus a further analysis on this topic may bring interesting insights.

Table 1: Descriptive statistics about satisfaction statements, 1997-2013.

	Overall	Shopping	Art	Info	Hotels	Security	Food	Environment	Courtesy	Prices
MEDIAN	8	8	9	8	8	8	9	9	8	7
Interq. Interv.	1	2	2	2	2	2	2	2	2	3
SD	1.2	1.5	1.5	1.9	1.7	1.7	1.5	1.6	1.5	2

MEDIAN	Overall	Shopping	Art	Info	Hotels	Security	Food	Environment	Courtesy	Prices
Aged0-14	9	8	9	8	8	8	9	9	9	6
Aged15-24	8	8	9	8	8	8	9	9	8	7
Aged25-34	8	8	9	8	8	8	9	9	8	7
Aged35-44	8	8	9	8	8	8	9	9	8	7
Aged45-64	8	8	9	8	8	8	9	9	9	7
Aged65-	9	8	9	8	8	8	9	9	9	7
Manager	8	8	9	8	8	8	9	9	8	7
Lower Manager	8	8	9	8	8	8	9	9	8	7
Employee	8	8	9	8	8	8	9	9	8	7
Factory Worker	8	8	9	8	8	8	9	9	9	7
Dependent (other)	9	8	9	8	8	8	9	9	9	7
Self employed	8	8	9	8	8	8	9	9	8	7
Student	8	8	9	8	8	9	9	9	9	7
Housewife	9	8	9	8	9	9	9	9	9	7
Retired	9	8	9	8	9	9	9	9	9	7
Unoccupied	9	8	9	8	8	8	9	9	9	7
Other	8	8	9	8	8	8	9	9	8	7
Female	8	8	9	8	8	8	9	9	8	7
Male	8	8	9	8	8	8	9	9	9	7
Congress	8	8	8	8	8	8	9	8	8	7
Religion	9	8	9	8	8	8	9	9	9	7
Business	8	8	8	8	8	8	9	8	8	7
Health	9	8	9	9	9	9	9	10	9	7
Shopping	8	9	10	8	8	8	8	9	8	6
VFR	8	8	9	9	8	8	9	9	9	7
Marriage	9	8	10	8	8	9	9	9	9	6
Study	8	8	9	8	8	8	9	9	8	7
Leisure	8	8	9	8	8	8	9	9	8	7

Source: the Authors

The highest median satisfaction level for each destination's attribute is highlighted in green, the lowest one in yellow.

3.2 Tourist satisfaction in the 10 main Italian destinations

Considering the number of questionnaires completed by travelers who stayed in hotels, the main Italian attractions, for inbound tourists, are not only beaches and mountains, but rather art cities. In fact, among the top 10 Italian destinations we find Rome, Venice and Florence, but also further art cities, like Verona, Siena and Naples, as well as business districts with a strong vocation to export, like Milan, Turin and Bologna. Also Rimini, a roman city that is best known for seaside activities and nightlife attractions, appears in the top ten (see Table 2). This ranking does not fully coincide with those in ISTAT (2016), where Bozen, Trento and Brescia are ranked among top 10 tourism destinations, while Siena, Bologna and Turin are not. This difference could be partially explained by the fact that the Bank of Italy measures arrivals from the demand side while ISTATmeasures arrivals from the supply side. Possible differences can also depend on the visitors' willingness to answer satisfaction questions in diverse provinces.

Table 2: Number of respondents in the 10 first destinations and distribution by travel purpose (the highest frequencies are highlighted), 1997-2013.

	Respondents									
	All	Congress	Religion	Business	Health	Shopping	VFR	Marriage	Study	Leisure
ROME	96,948	2.58%	0.66%	18.63%	0.03%	0.27%	1.20%	1.73%	0.84%	72.35%
VENICE	80,550	1.54%	0.01%	8.22%	0.06%	0.22%	0.94%	1.77%	0.54%	84.93%
FLORENCE	78,408	3.76%	0.04%	14.16%	0.03%	0.25%	2.04%	1.25%	1.63%	75.77%
MILAN	74,826	5.08%	0.10%	59.24%	0.06%	0.99%	2.00%	0.14%	0.62%	29.55%
TURIN	62,111	6.46%	0.16%	72.93%	0.02%	0.17%	1.71%	0.06%	0.97%	15.95%
NAPLES	55,482	3.35%	0.19%	17.88%	1.08%	0.41%	1.44%	1.58%	0.94%	72.14%
VERONA	53,988	5.07%	0.03%	24.57%	0.14%	0.43%	1.37%	0.57%	0.64%	63.59%
RIMINI	45,474	2.05%	0.18%	14.01%	0.11%	7.64%	1.42%	0.37%	0.37%	71.50%
BOLOGNA	40,302	8.49%	0.07%	62.04%	0.15%	0.66%	2.04%	0.06%	1.22%	22.27%
SIENA	24,432	3.29%	0.20%	10.68%	0.29%	0.12%	2.04%	0.98%	1.08%	79.84%

Source: the Authors

Despite their rich artistic and historic endowment, Milan, Turin and Bologna represent business destinations, as indicated by their market share of business travelers. Surprisingly, among these three business districts, Milan (the business capital of Italy), is ranked just third in percentage terms, with 59% of business travelers (44,324 respondents) and 5% of congress tourists (3,802 respondents). The top business destination is Turin, with the business segment reaching the 73% of the total market (45,297 respondents) and the congress sector the 6% (4,011 respondents). Bologna is the first congress city of Italy, for the relative size of this segment, equal to 8% (3,420 respondents), maybe thanks to the presence of its university. The highest percentage of health tourism is recorded in Naples, possibly due to the island of Ischia, where specialized medical centers rose near the famous thermal baths. Rome, Venice and Florence appear mainly leisure destinations, but it is worthy of note that they excel also on other segments. The 2% of Rome, Venice and Naples' tourism market is

represented by honeymoons. The same share is composed by international students in Florence, about three times, in absolute terms, as those surveyed in Bologna, and the 150% of those in Rome.
Turning to the consideration of tourist satisfaction, Table 3 shows how the median satisfaction statements with the different attributes of the tourist experience vary between the first 10 provinces, for number of respondents. Siena gets the highest overall satisfaction judgment, while there is no difference between destinations in the average stated satisfaction with the quality and variety of goods in shops. As expected, the artistic endowment is assessed excellent in Rome, Venice and Florence, where it is apparently at the height of its fame. Conversely, the average tourist satisfaction with art in Milan, Naples and Turin is a little lower than in other provinces. Turin records a small figure also concerning the satisfaction with tourist information, a very important attribute to visitors usually having little time to search for places, as business travelers.

Table 3: Median satisfaction statements in the first 10 provinces, 1997-2013.

	Median Satisfaction with:									
	Overall	Shopping	Art	Info	Hotels	Security	Food	Environment	Courtesy	Prices
ROME	8	8	10	8	8	8	8	8	8	6
VENICE	8	8	10	8	8	9	8	9	8	6
FLORENCE	8	8	10	8	8	8	9	9	8	6
MILAN	8	8	8	8	8	8	9	8	8	6
NAPLES	8	8	8	8	8	8	9	9	8	7
TURIN	8	8	8	7	8	8	8	8	8	6
VERONA	8	8	9	8	8	8	9	9	9	7
RIMINI	8	8	9	8	8	8	9	9	9	7
BOLOGNA	8	8	9	8	8	8	9	8	8	7
SIENA	9	8	9	8	8	8	9	9	9	7

Source: the Authors
The highest median for each travel purpose are highlighted in yellow, the lowest is in red.

The average perceived performances of hotels and security levels are very homogenous in the 10 considered destinations. Conversely, the local cuisine seems on average less appreciated in Rome, Venice and Turin. The capital city records a lower average evaluation than other provinces also with reference to the environment, along with the business centers of Milan, Turin and Bologna. Based on the average satisfaction levels, the courtesy of residents looks especially appreciated in Rimini, Verona and Siena. Maybe this evidence can be explained by the high concentration of tourists in wide art metropolis, that makes residents employed in tourist services seem less friendly and hospitable, just because they are too busy. In fact, tourists typically concentrated in few (art or business) places generate short-term unbalance between demand and supply, especially in certain moments of the day, when all the visitors ask for the same service (e.g. meals or check-out) simultaneously. We got preliminary evidence that courtesy depends on the tourist spending capacity, a topic that needs to be further deepened. Prices are rated just sufficiently appropriate, on average, in

Rome, Venice, Florence, Milan, Naples and Turin; this latter city seems to be perceived as more expensive than other destinations.

Conclusion

This work investigated the composition of the inbound tourist market, focusing on important social and economic variables, which are not usually considered in official inquiries. Moreover, we examined the performances of the main attributes of the Italian tourist experience in term of tourist satisfaction in the 1997-2013 time lapse. Purpose of travel, tourist satisfaction, expenditure and length of stay, are also analyzed with regard to the ten most visited destinations. We exploit information from more than a million data collected in a survey on international tourists who visited Italy during the time period 1997-2013, published by the Central Bank of Italy. This extensive dataset allowed to drawing insights of interest to Italian policy-makers, marketers and managers of tourism-related industries. We focused on visitors who lodged in hotels (excluding commuters).
As expected the ten provinces recording the highest of number of arrivals include the most famous Italian destinations in the world, particularly because of art, history and culture. This datum confirms that attractiveness of the Italin peninsula, to the eyes of foreign travelers, is still largely based on the most renowned cultural heritage. However, also important business and shopping districts are ranked among the top ten destinations, as it might be expected considering that Italy is the eighth economic power in the world, in terms of GDP (nominal value), export and import of goods (in 2012, see IMF, 2016b). The analysis of the tourist satisfaction by destination allowed us to verify that fashion, design, food and wine (all key components components of the Made in Italy brand) continue to catalyse the interest of foreign customers.
Most of the interviewed foreign visitors who lodged in hotel (72%) travel to Italy for leisure, 17% for business or congresses, 4% for visiting friends and relatives. The predominance of leisure tourism reflects the natural vocation to leisure tourism of a territory which, beside historical, cultural and artistic attractions unique in the world, is characterized by a pleasant climate, charming coasts, mountains and valleys, allowing visitors to live relaxing, entertaining or exciting experiences. The most represented age class is that between 45 and 64 years.
Over the considered 17 years, nationwide the global average daily expenditure (2005 base price) equals 132€ per person and the median 84€. Visitors who come in Italy for shopping spend on average 397€, the highest figure. The lowest expenditure is that of international students, with a mean of 93€. The deepening of the analysis at the destination level highlights that, in this regard, there are important differences between provinces. This evidence encourages further research on tourist spending patterns in the Italian destinations. This can be the pre-requisite to tune effective marketing strategies for promoting each single province, and to help destination managers planning accommodations, attractions or entertainment activities in line with the expectations and purchasing power of the specific international market segment targeting that region.

Provinces and municipalities are often the areas of main interest in tourism analyses (at the sub-regional level), because administrative borders circumscribe the scope of the implementation of tourism policies. By attracting many visitors with shopping purpose and offering innumerable nightlife occasions, Rimini appears the most profitable destination, among the first 10 most visited provinces, while Verona results the least remunerative one. This finding hints that, with reference to the current structure of the Italian tourism supply, art and culture are less profitable than service-intensive seaside tourism and entertaining activities. Policy-makers should beware of this aspect, because it highlights an inefficiency of the tourism supply. Some destinations are home to unique and non-replicable resources, but are able to monetize less than provinces building their offer on resources very similar to those of other international destinations.

On average, international travelers visiting Italy spend 15 nights in the main destination province. Such value is likely increased by honeymoons (lasting 20 days, on average) and periods of study abroad (of 22 days, on average), that are longer than leisure trips (having a mean of 16 nights). This hypothesis may justify the long average length of stay in Venice, Napoli and Florence, where these kinds of tourism flows are more important. Most of the travelers visit just 1 or 2 municipalities during their journey within the target province. In the light of the many different ancient villages dotting Italy, each hosting unique cultural and natural attractions, this datum is quite disappointing and might suggest that the regional diversity and richness of small areas are not promoted well enough on the international stage.

Moreover, the median length of stay, at the national level, is just 6 nights per province, while the average number of nights spent in the destination municipality is 4. This evidence strengthens the hint that destination marketers should more effectively communicate the local diversity and wealth of cultural, naturalistic and culinary attractions offered by the less famous municipalities. It seems necessary to induce inbound tourists to spend more nights in the destination province, by tempting them to explore also the many interesting town and villages, close to their main destination. Our findings show that currently inbound tourists stay concentrated in the main art cities for short periods, where they spend a few money. Thus, destination managers should be concerned with attracting travelers with high spending capacity and with giving them reasons to stay longer. Apparently, the uniqueness of the tourism offer is not enough to reach these goals, while encouraging the improvement of the quality and variety of products in shops could help. Moreover, a more effective promotion of small municipalities, favoring the mobility of the travelers throughout the country, would increase also the total tourist expenditure and favor a more balanced regional development.

Turning to the assessment of the performances of the main attributes of the tourist experience, as perceived by international tourists visiting the first ten provinces (in terms of number of arrivals), we found judgments with a median value equal to 8 for most of the main tourism-related attributes. These distributional characteristics are very common for satisfaction statements, which tend to be very concentrated on the highest values of the employed Likert scale (Peterson & Wilson, 1992). The price level appears the least satisfying aspect, with a median evaluation of 7, maybe as a result of international travelers' disconfirmed expectations. In fact, before the introduction of the Euro, the Italian currency was very weak, thus Italian provinces were perceived as cheap destinations and maybe some tourists expect them to be still inexpensive. Conversely, art, food and environment attain the highest score: 9, as might be expected, because the extremely rich cultural and artistic heritage, the variety of beautiful landscapes and natural attractions, and the unmistakable delicacies of the Italian cuisine made this country famous all over the world. Interestingly, data show that the eldest people, housewives and retirees, tend to report higher satisfaction judgements than other market segments.

A more heterogeneous situation emerges from the analysis at the single destination level. Overall, among the 10 most visited provinces, Siena achieves the highest average overall satisfaction, moreover, it is the province where tourists stay for the longest period of time, tied to Naples. Art is the attribute in respect to which the 10 destinations are more heterogeneous. As expected, Rome, Venice and Florence spire as art cities. On the opposite, the destinations' performances are all very homogeneous with reference to shopping, hotels' quality and security levels. With reference to the last aspect, this is not surprising, because security services are managed at the national level. While the homogeneous performances of shopping and accommodation services are interesting, as most of the shops and hotels are independent SMEs (Lazzeretti & Petrillo , 2011). This homogeneity may reflect on the one hand the fine culture of hospitality characterizing the Italian people and, on the other hand, the fact that the Made in Italy brand is an actual guarantee of quality.

This work represents just a preliminary and partial result, compared to the many research horizons opened by the database of the Central Bank of Italy. In particular, adopting more a sophisticated statistical methodology, future researches may deal with clustering destinations based on both the performances of their main aspects and the characteristics of their main market segments; monitoring the dynamic of tourist satisfaction over time; analysing tourist spending patterns by origin country.

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