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Communications of the Association for Information Systems

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Open Voucher and the Tourist Season in Sardinia

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Abstract:

In the year 2004 Portale Sardegna, an Italian online tour operator, launched a new product, Open Voucher (OV), with the bold objective of prolonging the tourist season on the island. The idea was conceptually simple: to create a Sardinian tourist product capable of attracting travelers to the island during the low season, while the implementation was quite difficult. Open Voucher attempted this de-seasonalization through the development of an Internet-enabled network of affiliated hotels providing availability of rooms year round and offering their product through the Open Voucher platform at a low, fixed rate. In the years ranging from 2004 to 2006, Open Voucher showed good traction in the marketplace, but in 2007 it began to record falling bookings and deteriorating results. What was happening? Had the leadership team defined the strategy to launch Open Voucher properly? Was it even possible to re-launch the Open Voucher product?

Keywords: tourism industry, organization, inter-organizational system, collaboration system, automation

Editor's Note: A teaching note for this case can be obtained from fcabiddu@unica.it. Only active MIS faculty who are currently listed in the AIS Faculty Directory are eligible to receive the teaching note.

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I. INTRODUCTION

Portale Sardegna was an Italian online tour operator company, established in 2001 by Massimiliano Cossu. The company was incorporated as a licensed travel agency and registered tour operator under Italian Law in Nuoro (Italy) on the beautiful island of Sardinia. In the year 2004, Massimiliano Cossu and Marco Demurtas (a co-founder of Portale Sardegna) launched a new product, Open Voucher (OV), with the bold objective of prolonging the tourist season on the island. They made this decision because the tourism sector in Sardinia suffered from a marked weakness: a strong seasonal flux in tourism that resulted in over-crowdedness, congestion, and pollution during the summer, and low occupancy during the rest of the year. Moreover, the elevated seasonality of Sardinian tourism was perceived as a restraining factor that economic operators were attempting to overcome.

The idea of Open Voucher emerged in 2003 when a German low-cost airline (Hapag-Lloyd Express) announced the introduction of year-round flights to Sardinia, rather than just seasonal ones. The idea was conceptually simple: to create a Sardinian tourist product capable of attracting travelers to the island during the low season. The implementation, however, was quite difficult.

Open Voucher attempted this de-seasonalization through the development of an Internet-enabled network of affiliated hotels providing rooms year round and offering their product through the Open Voucher platform at a low, fixed rate. In the years 2004 to 2006, Open Voucher showed good traction in the marketplace, but in 2007 it began to record falling bookings and deteriorating results. What was happening? Had Massimiliano Cossu and Marco Demurtas properly defined the strategy to launch Open Voucher? Was it possible to re-launch the Open Voucher product?

Open Voucher represents a case of travel innovation utilizing software and the Internet to create a geographically orchestrated network of discrete products that can be dynamically packaged into an itinerant holiday bundle combining multiple hotels and car rental.

II. THE TOURISM INDUSTRY IN SARDINIA

Tourism was an important and fast-evolving economic driver for the Sardinian economy, involving large numbers of small and medium-sized enterprises. Its contribution to growth and employment varied widely across the Provinces of the region. Particularly in rural towns, tourism was often one of the main sources of income for the population and a prominent factor in creating and securing an adequate level of employment.

The Birth of Portale Sardegna.com

Massimiliano Cossu, a Sardinian who had found work in Milan as a trader with Cabot Holdings upon graduation from university, conceptualized Portale Sardegna in 1999 at the height of the dot-com era. Cossu recalls:

I had been living in Milan for about seven years at that point, was looking at Sardinia "from a distance," and realized that from a tourist perspective and in terms of proper tourist products, the island had serious distribution problems. Furthermore, the Sardinian tourist offer, though greatly appreciated the world over, was completely out of the "commercial mainstream."

Cossu had the idea of selling "Sardinia" through the creation of a number of "Sardinia Points" located in major cities around Italy. Such an approach, he reasoned, would allow both visibility and accessibility to Sardinia as a tourist product. Yet, the economics of establishing such physical locations were daunting, given the typical margins in tourism distribution. But the rapid growth that the Internet was experiencing in Italy in those years offered a viable solution. Cossu recounted the turning point:

One day during an interview, the Italian Prime Minister said that Italy should create Portale Italia (the Italian portal). A friend of mine purchased that domain immediately and told me: "You should purchase Portale Sardegna!"

After quitting his position at Cabot Holdings, Cossu returned to Sardinia with the idea of selling Sardinia online. He immediately began to look for people who had complementary professional experience and the requisite skills to help him launch the venture. After an initial analysis, the Portale Sardegna team immediately realized that, at that time, there was no market for distributing Sardinian hotels and products online. Cossu recalled:

We were the true pioneers of an online booking engine focused on Sardinia.

Their early competitor was www.sardegna.com, a site mostly positioned as an information intermediary selling advertising space for Sardinian hotels and vacation rentals on the island.

Sardegna.com started its business in 1995 by purchasing the www.sardegna.com domain. Thanks to a number of collaborations with local and international agencies specializing in incoming tourism to Sardinia, the company gradually improved its sales channels, and step-by-step it was able to create a true network. www.sardinia.net, www.sardegna.tv, www.sardiniatourism.com, www.sardinientourismus.de, and www.freebooking.it, together with www.sardegna.com formed the newly born network.

The main difference between the offers provided by Open Voucher and www.sardegna.com was that the first gave its clients the chance to select an “itinerant trip” by changing hotels daily, while the second didn’t offer the same possibility. Another difference lay in the fact that the former offered car rental included in the price, while the latter offered only an online link to a car rental booking agency. In brief, Open Voucher cooperated with different players who offered a higher level of service when compared to its competitors.

Sweet Sardinia, another direct competitor, started its online business in 2001. It functioned as a tour operator company with a regular license released by the Sardinian Regional authorities. The company created an online research and booking system that offered a number of available services: holiday houses, residences, hotels, Bed and Breakfasts, tours, excursions, car rentals, sailing boat rentals, and everything else that could help customers plan their holidays in Sardinia.

In those years, however, a revolution that had begun five years earlier in North America with the birth of Travelocity and Expedia, was set to dramatically change the leisure and travel industry in Italy as well (Exhibit 1). The more advanced North American market saw online leisure travel bookings more than triple from 2001 to 2005. The impact of the Internet in Italy would be no different.

The Off-Season: A Problem or an Opportunity?

On an island like Sardinia, known chiefly for its breathtaking beaches and jet-setting summer locales, the problem of seasonality has always been a prevalent one. For many operators, being able to increase the length of the season beyond the summer months was critical to keeping their properties open for business. The idea of creating the Open Voucher product came about in 2003 when the founders of Portale Sardegna visited the BIT¹ in Milan. On that occasion they met Raffaele Ciaravola, marketing director of Geasar,² who mentioned his idea of selling hotel accommodations in Sardinia by using the Ciao Sardinia website (<http://www.ciaosardinia.com>). At that time, Ciao Sardinia was an ecommerce site focusing on low cost flights. Cossu remembered:

We were talking with Raffaele Ciaravola on how to attract people who had never been to Sardinia, on how to have them stay and provide them with basic services. While discussing these issues, Ciaravola suddenly surprised us all by suggesting that we collaborate with him in the selling of hotels operating in Sardinia through his Internet site.

This first phase of the collaboration spurred the idea of creating a branded low-season product administered by Portale Sardegna directly. The right opportunity materialized in 2003, recalled Marco Demurtas, the COO and director of sales of Portale Sardegna:

Hapag-Lloyd Express (HLX), now Tuifly, a German low-cost airline company, had announced the introduction of its flights to Sardinia by providing yearly links, not just seasonal ones. There was the opportunity: we had to create a product that would capture the interest of both travelers and HLX itself.

The formula came almost by chance, when Paola Porcu, director of Group Travel, was idly reading a trade magazine. Her attention suddenly fell upon a tour package that was based on a voucher³ formula designed by an Irish tour operator. After reading the article, she left it for Demurtas, who recounts:

¹ Bit (International Tourism Exchange) is the biggest Italian products exhibition in the world and the most important fair for the world tourist industry.

² Geasar is the company that manages Olbia airport.

³ Vouchers are used in the tourism sector as proof of a named customer's right to take a service at a specific time and place. Service providers collect them to return to the tour operator or travel agent that has sent that customer, to prove they have given the service.



At first I read the magazine with great skepticism; then I tried to find some information on the Internet and found out that in South America and many other places, this formula was successful. It may very well work for us as well, I thought.

III. THE DEVELOPMENT OF OPEN VOUCHER

The Portale Sardegna team began to think about the voucher model as a solution for improving off-season travel to Sardinia and immediately set off to find suitable partners. They started with Ciaravola and a car rental broker, Michele Fara, CEO of Rent.it,⁴ who were both immediately interested. Meanwhile, the leadership people at Portale Sardegna decided to set up a team to focus on the voucher product and recruited a few hotels who were already Portale Sardegna's clients to help design the "low season Sardinian product." After early discussions and testing, the product design team concluded that an itinerant package was the key. The offer was thus characterized by a hotel+car rental package for travelers arriving at one of the three major airports on the island. Prices were key in order to appeal to low-cost airline customers: 29,90€ per person, per day (3-star hotel) for the autumn/winter season, and 39,90€ for spring. A 10€ supplement applied to those guests wishing to book 4-star properties.

While progress was occurring, consensus was not a given within the Portale Sardegna team. Cossu was the most skeptical of all, ironically commenting at the time:

It might very well be that this product will make us 50 euro.

The Selection of Hotels

The product was named Open Voucher (OV), and the OV team set out to secure the collaboration of a wide range of hotels in different locations around the island. Fully engaged in the launch phase, however, the team failed to plan the identification and recruitment of an appropriate number of well-placed hotels, instead accepting partners as they came. Hotel affiliation was particularly difficult in the Cagliari market, the capital city of Sardinia, because that city market had different characteristics than the rest of the island. Cagliari, a city of 158,000 people, drew business travelers throughout the year and faced a lesser seasonal problem. According to Demurtas, however, another reason for the lack of distribution in the Cagliari market was to be found in Open Voucher's own early focus:

Open Voucher had a limited interest in having hotels in Southern Sardinia. OV was interested in having tourists that arrived with low-cost flights and, when the project was about to be launched, the low cost-flights were mostly flying into the Olbia airport, which was in the north.

The Launch of Open Voucher Sardegna

After a first phase of internal resistance, and after having finally found somewhat of a consensus among those involved in Portale Sardegna, Open Voucher officially launched on October 26, 2004, with about thirty affiliated hotels, out of the 883 properties on the island. The agreement with HXL and Geasar was drawn up, and the Open Voucher platform was connected to the websites of Ciao Sardinia and HLX. At this point the firm took its offer to the larger Sardinian hoteliers' community. Demurtas described this juncture:

The initial reaction was one of uncertainty. Some immediately rejected the offer because they considered it unprofitable. Others, friends of ours, joined not expecting great results. Others still joined because they thought there was no downside in trying. Only a very small set of operators were really persuaded this could be profitable.

One operator recounted:

We began to collaborate with Open Voucher and started to promote the low season. Open Voucher allows for my hotel to be still open and running. Without operators like Open Voucher, it is hard to keep [my] hotel functioning; they bring a constant flow and movement of people.

Another added:

Tourism in Sardinia usually ends in September. By working in association with Open Voucher we have an incentive to bring tourists to the island. Open Voucher's prices are low, but 30 euro are better than an empty room.

Initial skepticism turned to enthusiasm shortly after the launch, as evident in one of the operator's comments:

⁴ Rent.it, on line since 1999, was a company that offers a fast, reliable, and affordable car, campervans, and hotel reservation service.

At the beginning, I joined the project with great skepticism, but then I had my hotel full of clients during the months of January, February, and March. [That] had never happened before; I was sold on the concept!

At the beginning the software was fairly simple; an empty container into which hotels uploaded their availability for any given date. A very small office had been set up, with only one German-speaking employee whose duty was to answer the phones and forward the reservation faxes to the hotels as reservations came in. Yet, resources came immediately under pressure. Demurtas recalls:

After the first days on the market, we became immediately aware of the fact that our operational strategy had to be revolutionized. We realized that our traditional methods were insufficient in order to withstand the number of daily incoming bookings. Information technology had to be much more central to our operations.

First of all, everybody realized that it was impossible to manage the bookings using their traditional process (on request), which proved inadequate. As the requests for Open Voucher packages came in, hotels were contacted by fax to inquire about room availability. Once the accommodation availability was confirmed by the hotel, the client was re-contacted and the reservation booked. During the month of January 2005, reservation numbers increased enormously: 200, compared to the ten bookings that Portale Sardegna booked on average during a typical January month. Demurtas commented: "We clearly needed the appropriate IT infrastructure."

The Open Voucher leadership thus began radically rethinking its operations and systems. In 2005 they made the first software changes and began to operate by using free sale criteria (Exhibit 2), as well as increasing the number of employees (from one to twelve).

In 2006 they further improved the booking system by adding automatic inventory availability search. Customer search would thus receive immediate confirmation of the availability of rooms. That meant, however, that while Open Voucher no longer needed to manually update availability, it had to ensure that an appropriate number of rooms were available at all times.

By 2007, they began to operate with the allotments system (Exhibit 2). During this phase the hotels granted Open Voucher a certain number of rooms for sale; but at the same time, they could actively interact with Open Voucher's online platform by inserting additional availability other than the contractual minimum. They could also use the stop-sale function.⁵ The release of rooms included in the allotment was regulated by a "release" period (Exhibit 1), which was automatically enforced by the Open Voucher system.⁶ The system implemented during the year 2007 was still in use in 2009 (Exhibit 3).

While Portale Sardegna did not consider itself a technology company, it was evident to all that information systems were a critical enabler of the Open Voucher product. As Demurtas put it:

It would have been impossible to offer the same service without the Internet. Everything can be booked online. You can build the itinerary online, reserve hotels, book the car. The Internet is essential for us, as it allows us to satisfy the requirements of immediacy, simplicity, and low cost of our main customers.

Open Voucher represented the only product that gave its clients the possibility to autonomously create an itinerant holiday package in Sardinia (Exhibit 4) by offering the possibility of choosing among over sixty 3- and 4-star hotels; paying a daily rate of 29,99 € (hotel + car rental); and having included in the price airport pick-up and return of the rental car. Upon completion of the itinerary, a fixed fee (9,99 €)⁷ was added to the reservation.

Market Response

Open Voucher showed good traction in the marketplace, with an increase in the number of foreign tourists on the island (Exhibit 5), and a broadening of the season (Exhibits 6, 7, 8, and 9). Open Voucher was also interested in customer feedback and issued customer surveys (Exhibits 10, 11). Commenting on the results, Porcu stated:

Our clients are very satisfied; they value the possibility of itinerary personalization and the high quality service that we are able to offer at a low-cost.

⁵ For example, if a hotel decided on a stop sale on the 5th of October, it meant that OV couldn't make any bookings on that date. The bookings, that had been made before the stop communication were all confirmed and taken into account.

⁶ For example, a seven-day release meant that the rooms that had been approved for the allotment could be sold up to seven days before the established availability date. For instance, a room that was available for the October 5 date had to be booked by September 28; after that time it wouldn't have been available anymore for the October 5 slot.

⁷ The fee payable by the client (only adult) to the company for the booking

One early problem, however, was related to the fact that tourists were concentrated in North Sardinia (Exhibit 12) because HLX landed exclusively at Olbia Airport, situated on the northeastern coast of the island. In 2005 Olbia Airport dealt with more than 1.6 million passengers. Further, in the North of Sardinia the airport of Alghero Fertilia was operating with more than 1 million passengers. In the years that followed, such passenger flow was increasing, thanks to the direct links with Europe and the opening of routes by low-cost operator Ryanair (Exhibits 13, 14, 15, 16, 17, and 18).

IV. EMERGING CHALLENGES

In 2007 Open Voucher began to record falling bookings (Exhibit 5). Cossu recalls:

We often wondered about the reasons for this sudden fall. Responsibility was ultimately assigned to one specific event: the weakening of our relations with HLX.

In 2007 HLX merged with TUI, one of the most important worldwide tour operators, becoming TuiFly, a low cost company based in Germany. From that moment on, OV's relationship with their key airline partner began to weaken. TUI, being a large tour operator, had its own hotel network and distribution services, and thus began showing less interest in the partnership with OV. TuiFly updated and renovated its website and its communication strategies to reflect that change. Up to that point HLX's homepage dedicated a lot of space and visibility to Open Voucher, but on the new TuiFly homepage Open Voucher had completely disappeared. TuiFly had also changed the contents of its newsletters, drastically limiting the space now dedicated to Open Voucher. As a consequence Open Voucher lost thousands of contacts (Exhibit 5). Demurtas remembers:

Despite this great loss, Open Voucher is a good product for us. Firstly, we sustained the costs for the implementation of the Open Voucher system in the past. Now, it has low costs of operation. It requires only two hours of work during the year for administration and contract renewal. Thirdly, during the collaboration with HXL, we created a client database of customers demonstrating a certain degree of loyalty towards the Sardinian off-season product and the Open Voucher system.

The recent turn of events convinced the OV leadership that it was time to find new ideas in order to preserve and attempt to grow the product.

Market Expansion

The year 2007 had not produced the desired results, but the founders of Open Voucher were certain about the value of their offer; they thought that if their idea of an itinerant package had produced good results in a difficult location like Sardinia, it would be a sure success in other markets. Yet, at this point they were unsure as to how to proceed. Cossu thought that it would be much easier to expand to Italy all at once, rather than taking one single region (e.g., Tuscany, Sicily) at a time. Others thought that a regional strategy would be simpler. The first view ultimately prevailed, but implementation of such a bold strategy proved difficult.

While hoteliers seemed to greatly appreciate the Open Voucher package, it was difficult to create the stable network of partners needed to launch a credible offer. Demurtas reflected on the difficulties they encountered:

We were faced with a new reality which we knew nothing about. One thing was to operate in Sardinia where the hoteliers were personal acquaintances and [we had] friends all over the island; another thing was operating in Italy. We succeeded in having wide interest in some regions, like Tuscany, Umbria, and Sicily, but in the rest of Italy we didn't have good coverage. More importantly, it is completely useless to have a contract with a hotel if they don't give you availability in the system.

But the difficulties encountered in their expansion into Italy did not discourage the founders of OV. They decided to retrench to a regional strategy and bring the Open Voucher product to Sicily, a region with characteristics similar to Sardinia. In Sicily, a more constrained market, they could count on the collaboration of two partners: Easy Car and Wind Jet. Easy Car was one of the leading international car rental brokers, with a worldwide network of more than 2,400 car hire locations in over sixty countries. Wind Jet was an Italian low-cost airline stationed at Catania Fontanarossa Airport linking Sicily to a number of European capitals such as Madrid, Paris, Barcelona, Bucharest, Moscow, and St. Petersburg.

One year from the launching of the offer the Sicilian product had yet to provide the desired results (Exhibit 19). After a year in operation, Open Voucher had forty affiliated hotels, with a limited availability in the system.

V. GOING FORWARD

Between the years 2008 and 2009 the founders of Portale Sardegna were struggling to define a new strategy that would allow them to re-launch the Open Voucher product by the end of 2010. Sitting at his desk, Marco Demurtas analyzed Open Voucher's performance during the past years and thought about the problem he faced. His short-term objectives focused on raising market visibility. However, considering the recent difficulties, he wondered whether he could make it.

There were many open possibilities but at the same time there were many questions that required an answer. Was it even possible to re-launch the Open Voucher product? If so, what information technology resources and capabilities should Demurtas and his team develop to enable such strategy?

Exhibit 1: European Online Travel Agencies Estimated Gross Booking and Share (€m) 2007

Brand	Country	Gross Booking (€m)	Market Share (%)
Expedia	U.S.	3,085	17.2%
Travelocity/lastminute.com8	U.S./U.K	2,204	12.3%
Priceline/Booking.com	U.S./U.K	1,973	11.0%
Opodo	Spain	1,300	7.3%
Ebookers/Rates to go/HotelClub	U.S/U.K	912	5.1%
Go Voyages	France	460	2.6%
Edreams	Spain	407	2.3%
Rumbo	Spain	320	1.8%
HRS	Germany	296	1.7%
Travel Republic	U.K.	292	1.6%
Seat24/SRG(ETI)	Scandinavia	280	1.6%
Voyage-sncf.fr	France	260	1.5%
Venere	Italy	229	1.3%
Ab-in-den-Urlaub.de	Germany	200	1.1%
PartiPasCher	France	180	1.0%
Terminal A	Spain	176	1.0%
Viajar.com	Spain	140	0.8%
Atrapalo	Spain	136	0.8%
L'tur	Germany	127	0.7%
Muchoviaje	Spain	98	0.5%
Via Travel	Scandinavia	95	0.5%
Hotel.de	Germany	92	0.5%
Weg.de	Germany	91	0.5%
Travelchannel	Germany	80	0.4%
Viajes ECI	Spain	80	0.4%
Marsans.com	Spain	70	0.4%
Travelstart	Scandinavia	66	0.4%
Travelpartner	Scandinavia	42	0.2%
Others	-	4,229	23.6%
Total		17,920	100%

Source: Private elaboration by using PhocusWright's European online Travel Overview Fourth Edition.



Exhibit 2: Terminology	
Concept	Description
Allotment	A commercial agreement on which the operator asks a hotel, or an airline company the availability of resources (rooms or airline booking) for a pre-determined period and quantity. The operator takes care of the selling without having to ask for confirmation of booking or price or tariff changes. Once the contract is terminated, hotels and airline companies have full availability of their products once again.
Release	Deadlines for the agreed periods of allotments
Free sale	Commercial agreement through which a supplier (e.g., hotel) grants an operator the possibility to freely sell pre-determined space (e.g., rooms), without any time-length and quantity restrictions and without the need to ask for booking confirmation until required (Stop Sale)

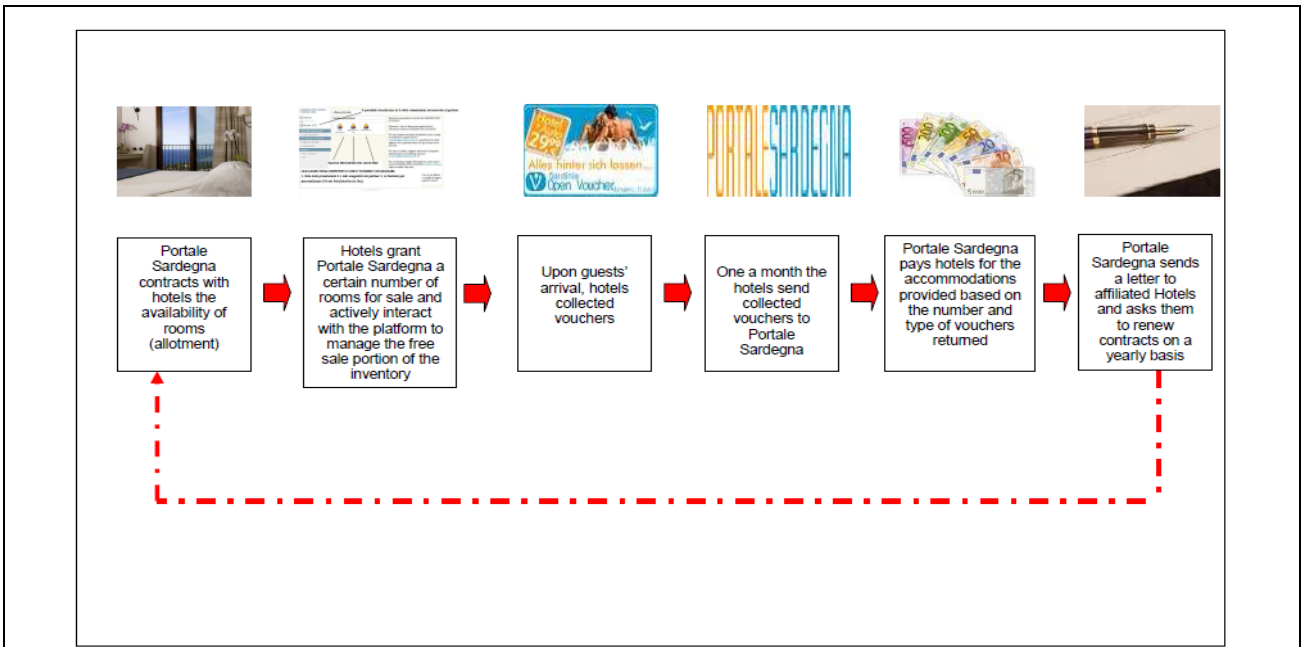


Exhibit 3: Hotel Interaction with Open Voucher Platform

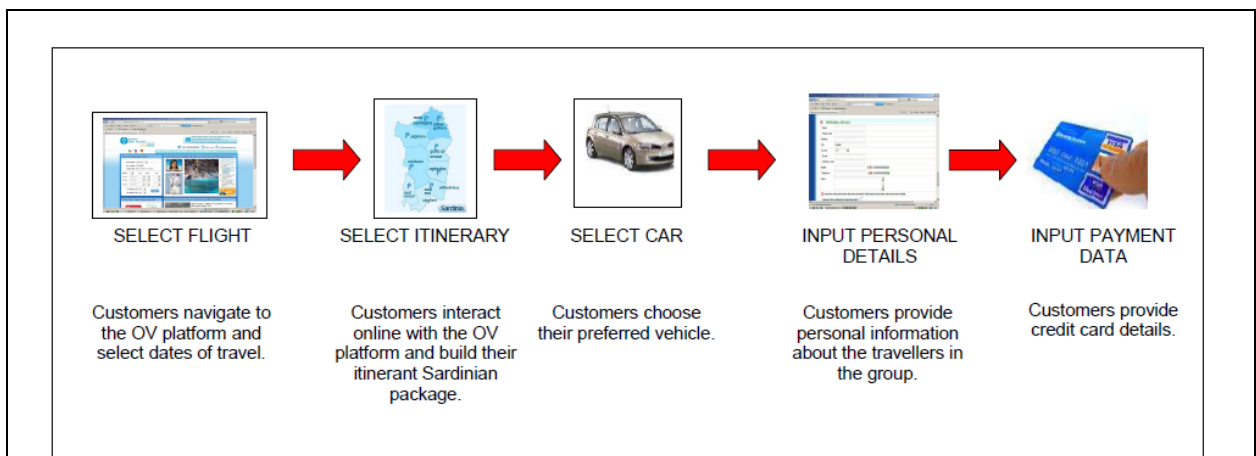
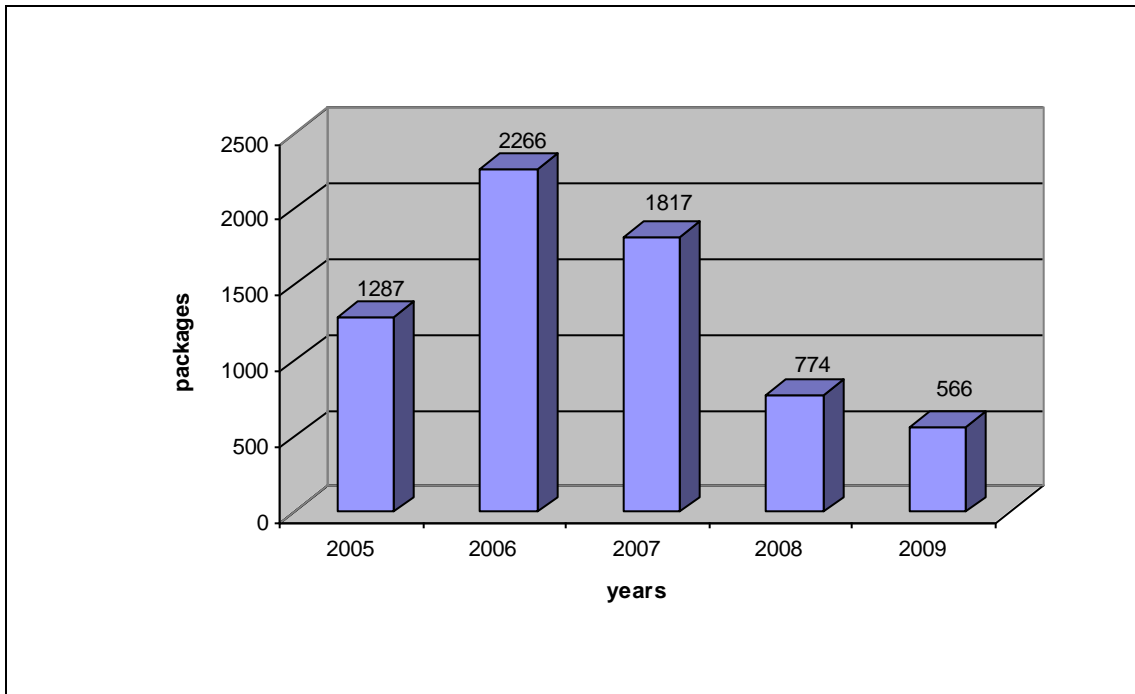
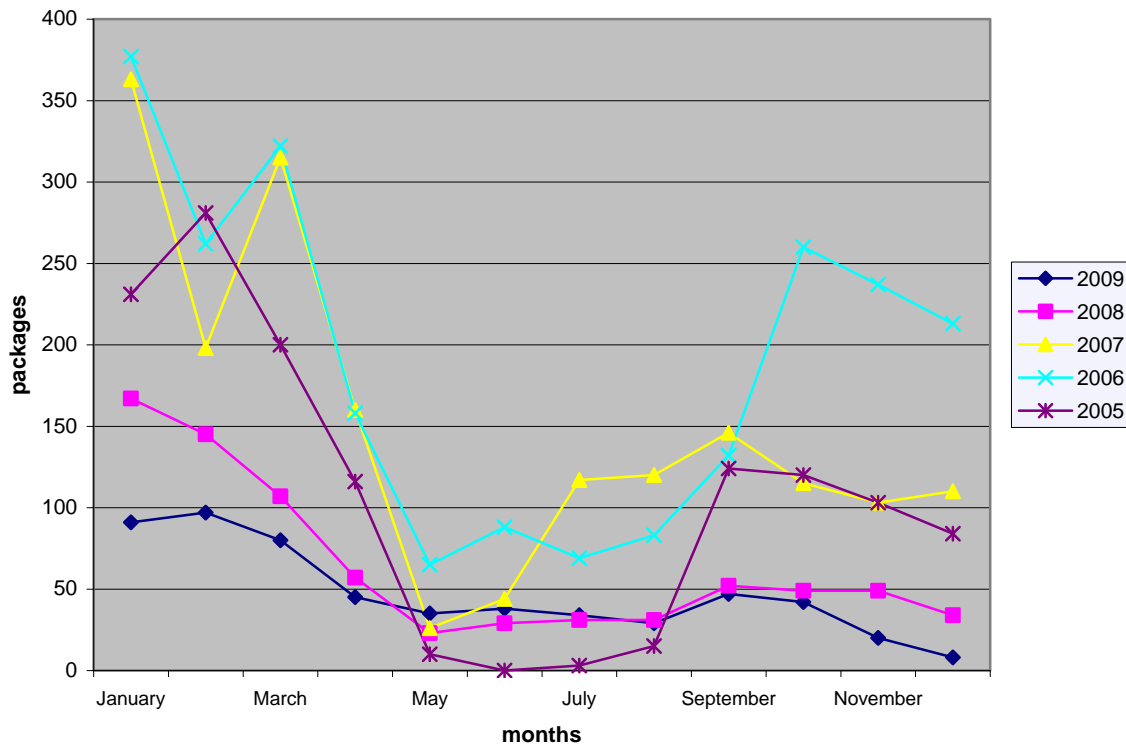


Exhibit 4: Open Voucher Customer Booking Flowchart



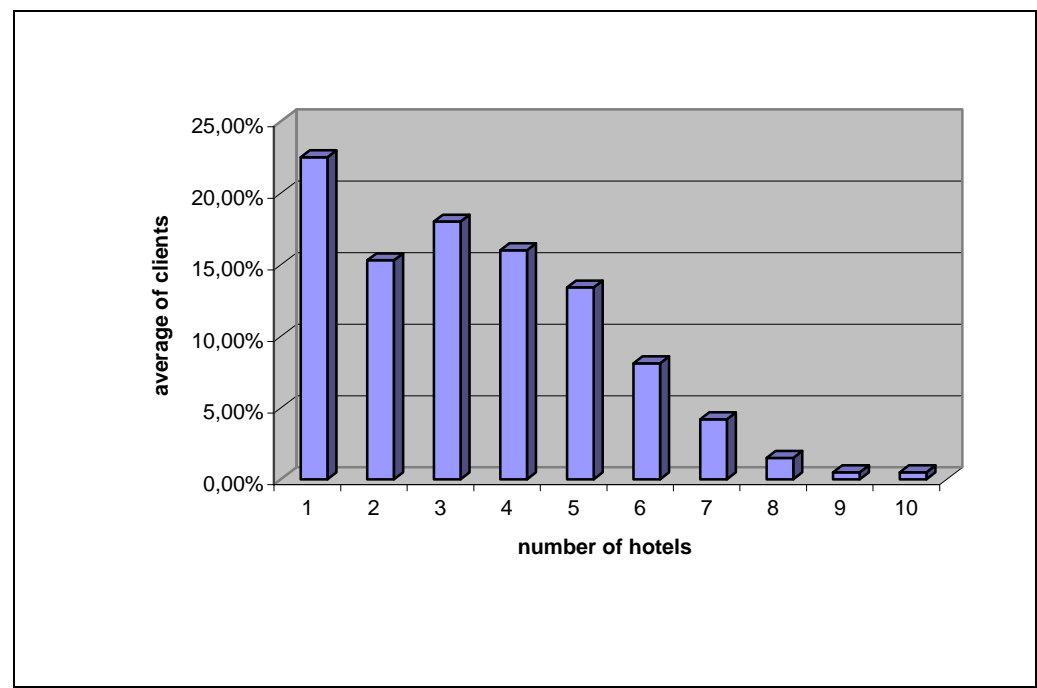
Source: Internal data provided by Portale Sardegna

Exhibit 5: Open Voucher Packages Sold in the Years Ranging from 2004 and 2009



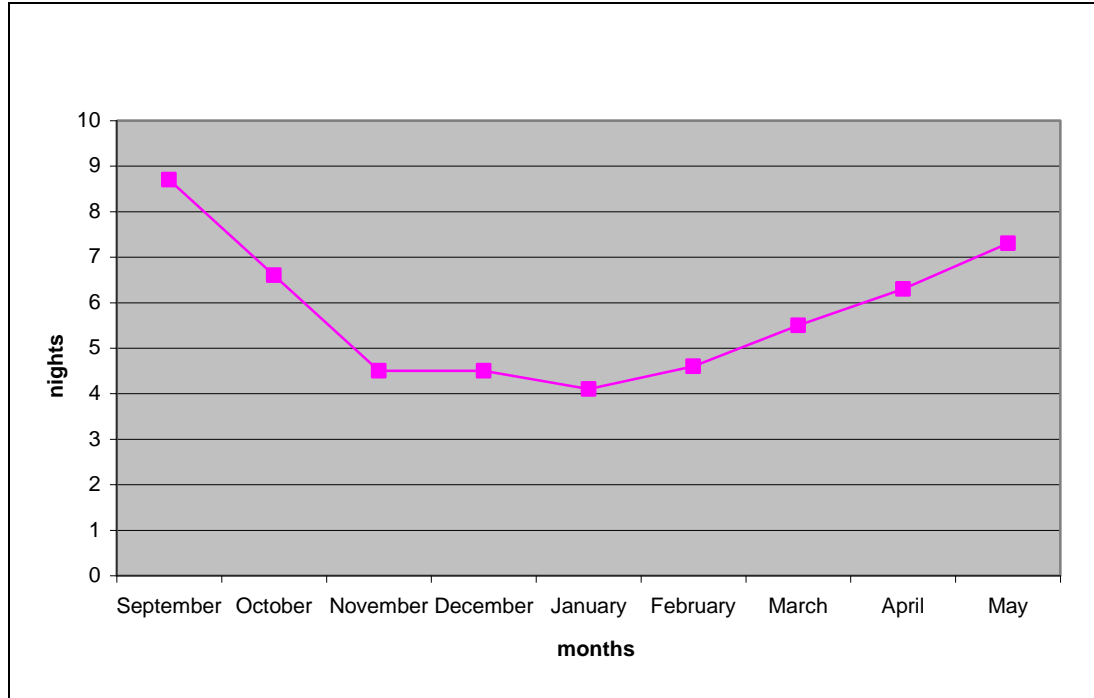
Source: Internal data provided by Portale Sardegna

Exhibit 6: Number of Open Voucher Packages Sold Monthly (2005/2009)



Source: Internal data provided by Portale Sardegna

Exhibit 7: Number of Hotels in Which Clients Found Accommodation



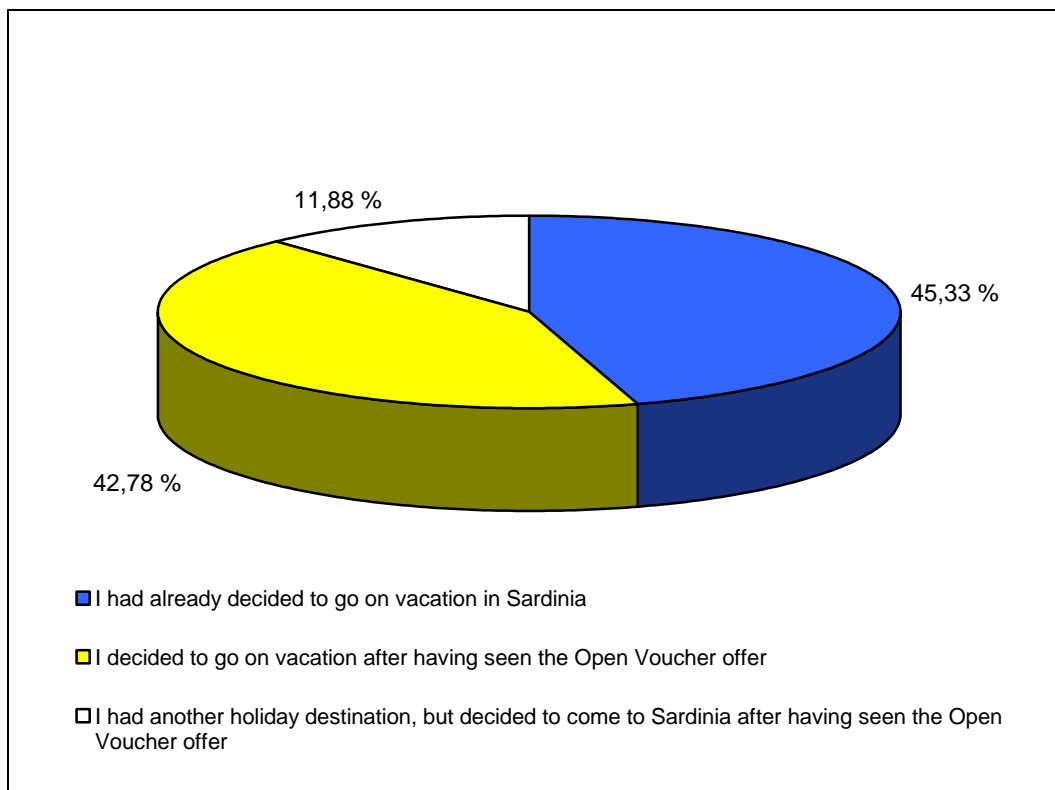
Source: Internal data provided by Portale Sardegna

Exhibit 8: Average Nights Spent by Tourist (2005)



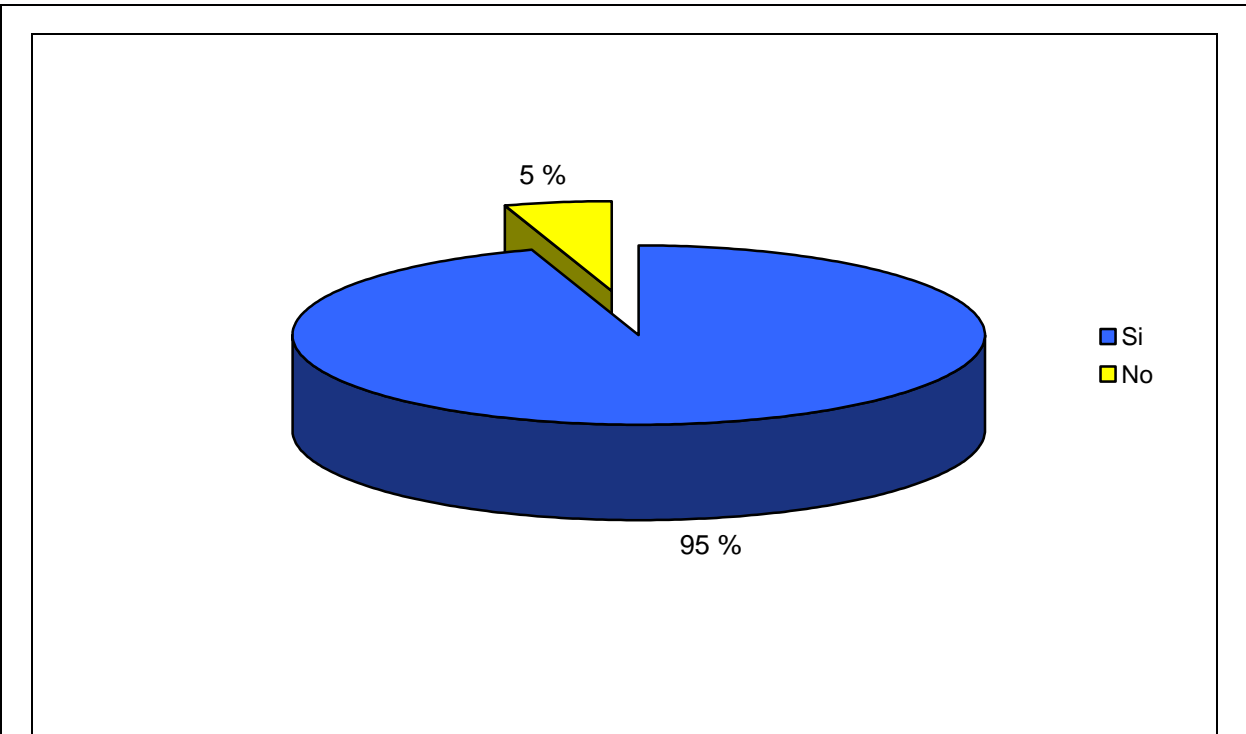
Exhibit 9: Average Price per Travel Package Booking (EURO)													
Year/Months	1	2	3	4	5	6	7	8	9	10	11	12	Total
2009	593	556	578	513	887	802	692	719	578	458	450	786	609
2008	544	545	595	672	968	870	733	667	636	504	600	376	598
2007	523	539	499	559	779	715	646	624	600	473	450	450	541
2006	415	450	458	561	672	675	621	623	547	494	462	541	500
2005	348	377	362	462	534	-	646	736	501	426	373	396	401
2004										303	384	443	393

Source: Internal data provided by Portale Sardegna



Source: Internal data provided by Portale Sardegna

Exhibit 10: Why Did You Decide to Spend Your Vacation in Sardinia?



Source: Internal data provided by Portale Sardegna

Exhibit 11: Were You Satisfied with the Open Voucher Package?

Exhibit 12: Distribution of Open Voucher' Client in Sardinia	
Sardinia	Distribution of tourists
North Western	10,2%
North East	41,9%
Central Western	13,1%
Central East	26,9%
South Western	3,8%
South East	4,1

Source: Internal data provided by Portale Sardegna

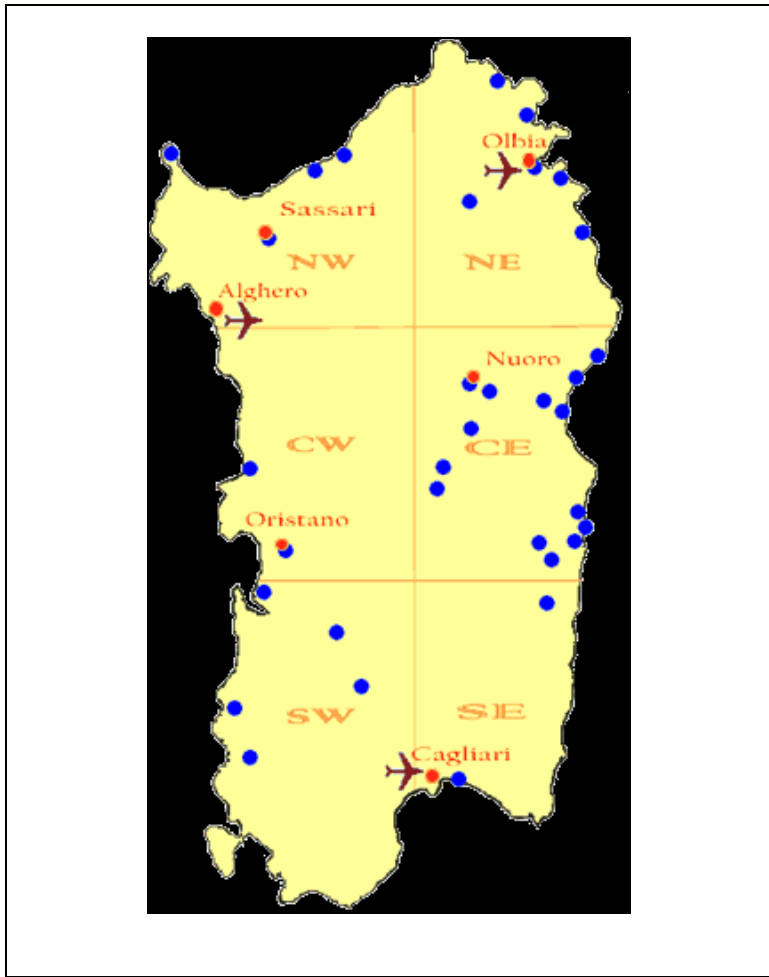
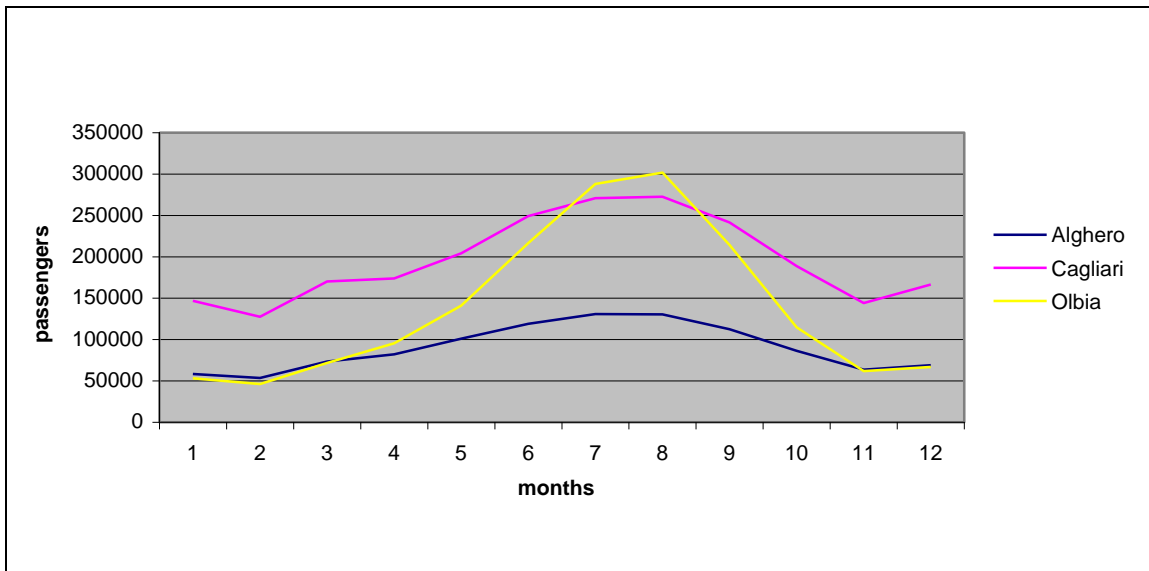


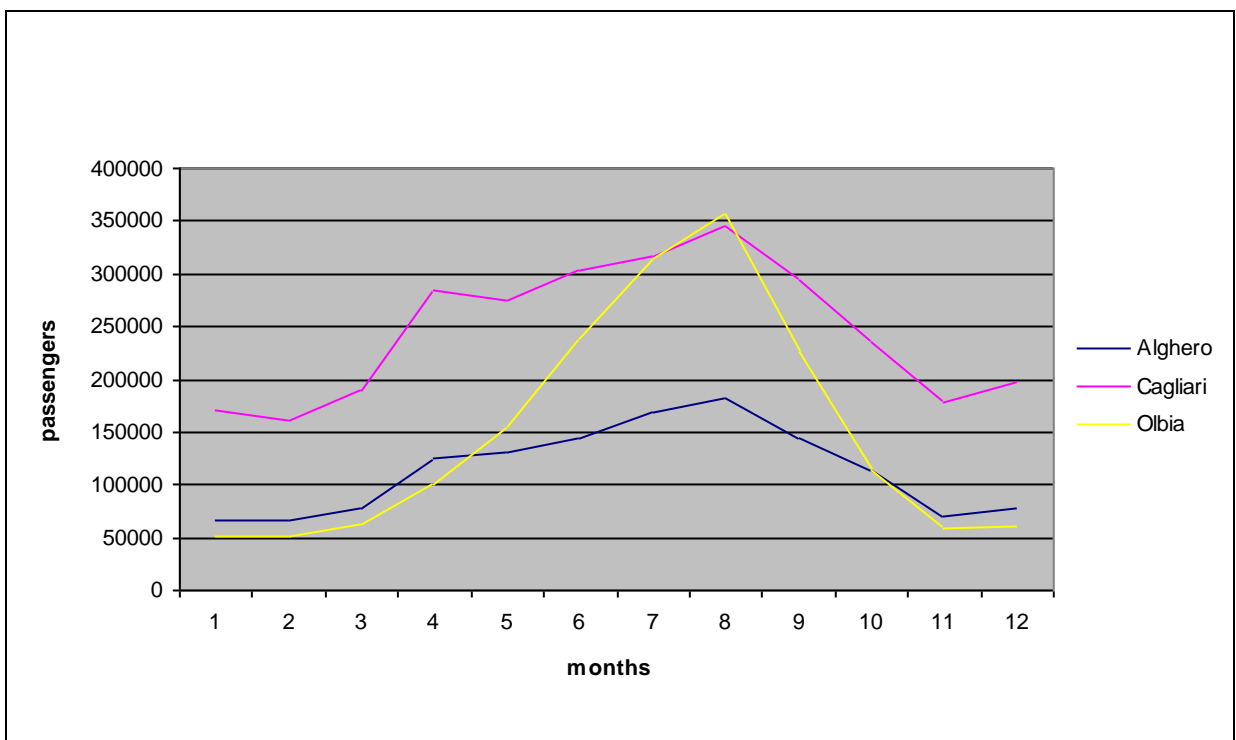
Exhibit 13: Map of Main Sardinian Cities and Airports

Source: Graphic provided by Portale Sardegna



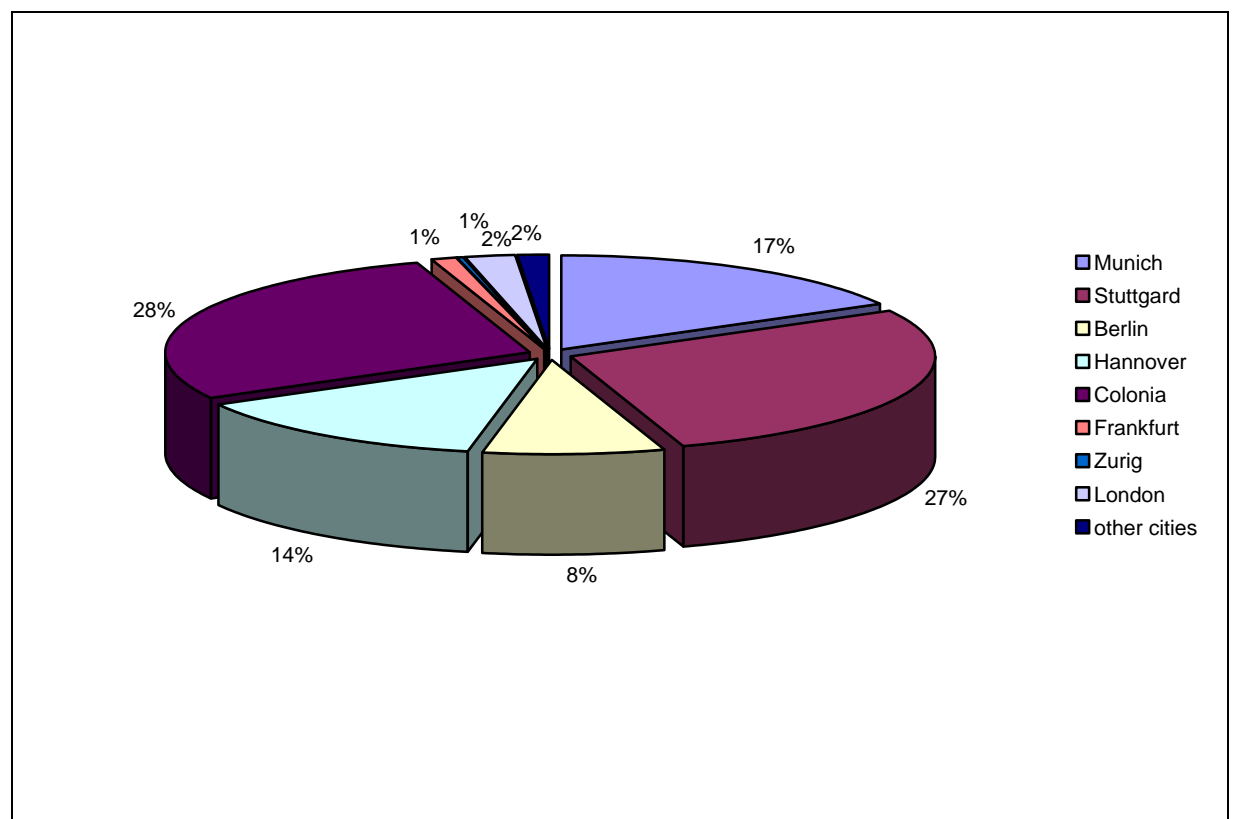
Source: private elaboration using Assaeroporti data

Exhibit 14: Total Number of Arrivals and Departures of Passengers Subdivided by Airport and Month (2005)



Source: private elaboration using Assaeroporti data

Exhibit 15: Total Number of Arrivals and Departures of Passengers Subdivided by Airport and Month (2008)



Source: Internal data provided by Portale Sardegna

Exhibit 16: What Was Your City of Departure in Sardinia?

Exhibit 17: Total Number of Arrivals and Departures of Passengers Subdivided by Airport and Month

Airport	2005			2008		
	Alghero	Cagliari	Olbia	Alghero	Cagliari	Olbia
Month						
January	58.278	146.848	53.068	65.711	170.403	50.754
February	53.584	127.516	46.096	65.869	160.219	50.498
March	73.473	170.191	71.743	77.388	189.290	61.789
April	82.056	173.924	95.349	124.493	283.851	100.508
May	101.077	204.193	141.062	130.918	274.616	155.252
July	118.931	249.135	216.598	143.355	302.622	239.750
June	130.685	270.803	288.082	168.082	317.414	315.418
August	130.462	272.476	301.729	181.582	344.521	355.898
September	112.434	241.427	214.216	143.439	294.627	225.749
October	86.327	188.777	114.656	113.961	234.309	113.403
November	63.621	144.069	61.745	70.327	179.068	58.222
December	69.046	166.437	66.842	77.551	196.962	60.752
Total	1.079.974	2.355.796	1.671.186	1.362.676	2.947.902	1.787.993

Source: private elaboration using Assaeroporti data, 2005, 2008



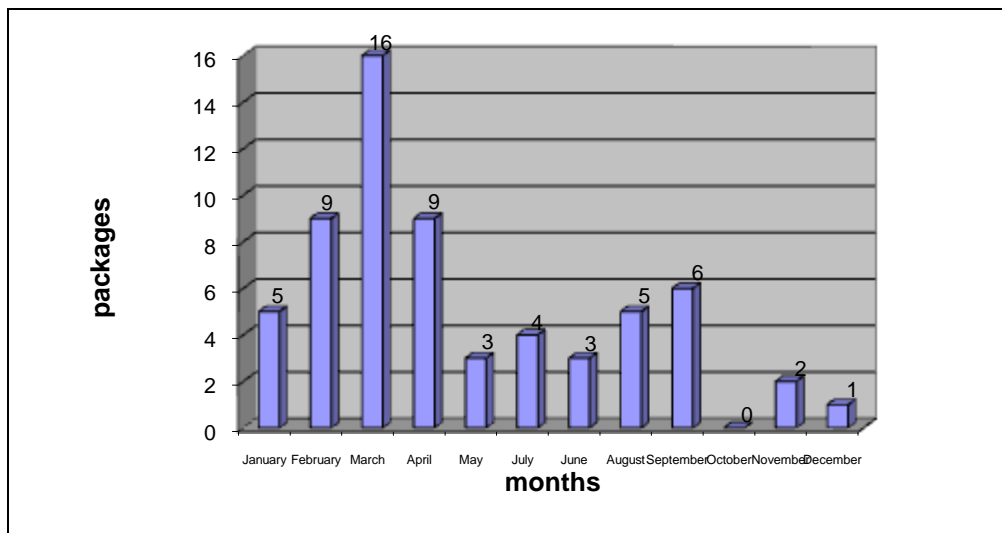
Exhibit 18: Arrivals and Tourist Presence in Accommodation Facilities for the Region of Sardinia, Provinces and Towns of Residence of Clients—Year 2007

Countries of residence	Accommodation		Total accommodation facilities	
	Arrivals	Presences	Arrivals	Presences
SARDINIA				
EUROPEAN UNION				
ITALY	1.183.990	5.643.077	1.490.648	7.991.819
Finland	2.303	9.470	3.296	16.174
Sweden	15.007	71.714	17.586	87.221
Denmark	4.669	25.266	7.382	44.969
Ireland	10.348	48.899	12.122	60.740
United Kingdom	92.261	496.392	102.664	560.736
Netherlands	20.924	101.858	29.855	156.595
Belgium	11.577	58.950	14.823	76.511
Luxemburg	1.792	14.126	2.102	15.787
Germany	147.723	688.647	224.284	1.138.105
France	86.562	349.806	110.529	440.841
Austria	20.292	95.903	29.946	145.854
Estonia	451	1.575	843	3.353
Latvia	393	790	465	1.038
Lithuania	698	2.089	851	2.448
Poland	5.409	24.656	7.641	39.337
Czech Republic	3.679	21.528	7.994	37.380
Slovakia	489	2.516	770	3.662
Hungary	2.057	9.359	2.651	12.351
Romania	2.901	14.166	3.269	17.487
Slovenia	2.991	8.056	5.812	19.502
Bulgaria	672	2.911	727	3.227
Spain	28.070	93.678	33.072	110.071
Portugal	3.190	11.220	3.565	13.339
Greece	2.392	7.793	2.561	8.599
Malta	234	924	268	1.005
Cyprus	62	261	93	636
TOTAL	1.651.136	7.805.630	2.115.819	11.008.787
Other European Countries				
Norway	3.959	22.472	4.935	29.361
Island	621	2.361	688	2.639
Switzerland	56.089	312.926	77.005	428.622
Croatia	766	2.325	854	2.919
Turkey	740	2.440	793	2.874
Russia	14.373	101.396	14.836	104.624
Other European Countries	7.538	38.805	8.303	42.895
TOTAL	84.086	482.725	107.414	613.934

Exhibit 18 – Continued

Countries of residence	Accommodation		Total accommodation facilities	
	Arrivals	Presences	Arrivals	Presences
SARDINIA				
EXTRA EUROPEAN COUNTRIES				
Egypt	209	1.025	225	1.137
Countries of Mediterranean Africa	773	3.352	822	3.669
South Africa	497	2.159	567	2.627
Other African countries	1.704	7.258	1.831	8.340
United States	17.549	60.870	18.538	65.131
Canada	3.340	10.332	3.727	11.613
Mexico	463	1.640	511	2.017
Venezuela	297	1.343	316	1.435
Brazil	1.890	7.588	2.071	8.678
Argentina	1.117	4.675	1.223	5.313
Other South America Countries	1.327	5.058	1.534	7.100
Israel	728	2.097	763	2.215
Other Middle Eastern countries	1.020	5.086	1.047	5.237
China	705	2.030	750	2.213
South Korea	185	717	225	818
Japan	2.179	7.012	2.250	7.355
India	327	918	342	966
Other Asian Countries	1.460	6.999	1.597	8.173
Australia	3.571	12.827	4.101	15.265
New Zealand	832	2.647	1.037	3.131
Other countries	11.598	55.414	13.463	66.059
TOTAL	51.771	201.047	56.940	228.492
TOTAL FOREIGN COUNTRIES	603.003	2.846.325	789.525	3.859.394
GENERAL TOTAL	1.786.993	8.489.402	2.280.173	11.851.213

Source: Personal Elaboration from ISTAT data



Source: Internal data provided by Portale Sardegna

Exhibit 19: Open Voucher Sicily Packages Sold in the Year 2009



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