Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Smart destinations, challenges for a new management paradigm

Roland Schegg

Institut of Tourism, HES-SO Valais, Sierre, Switzerland

Smart Destinations: new horizons in tourism research and management (#STDRM2017)
University Alicante, 25-27 October 2017

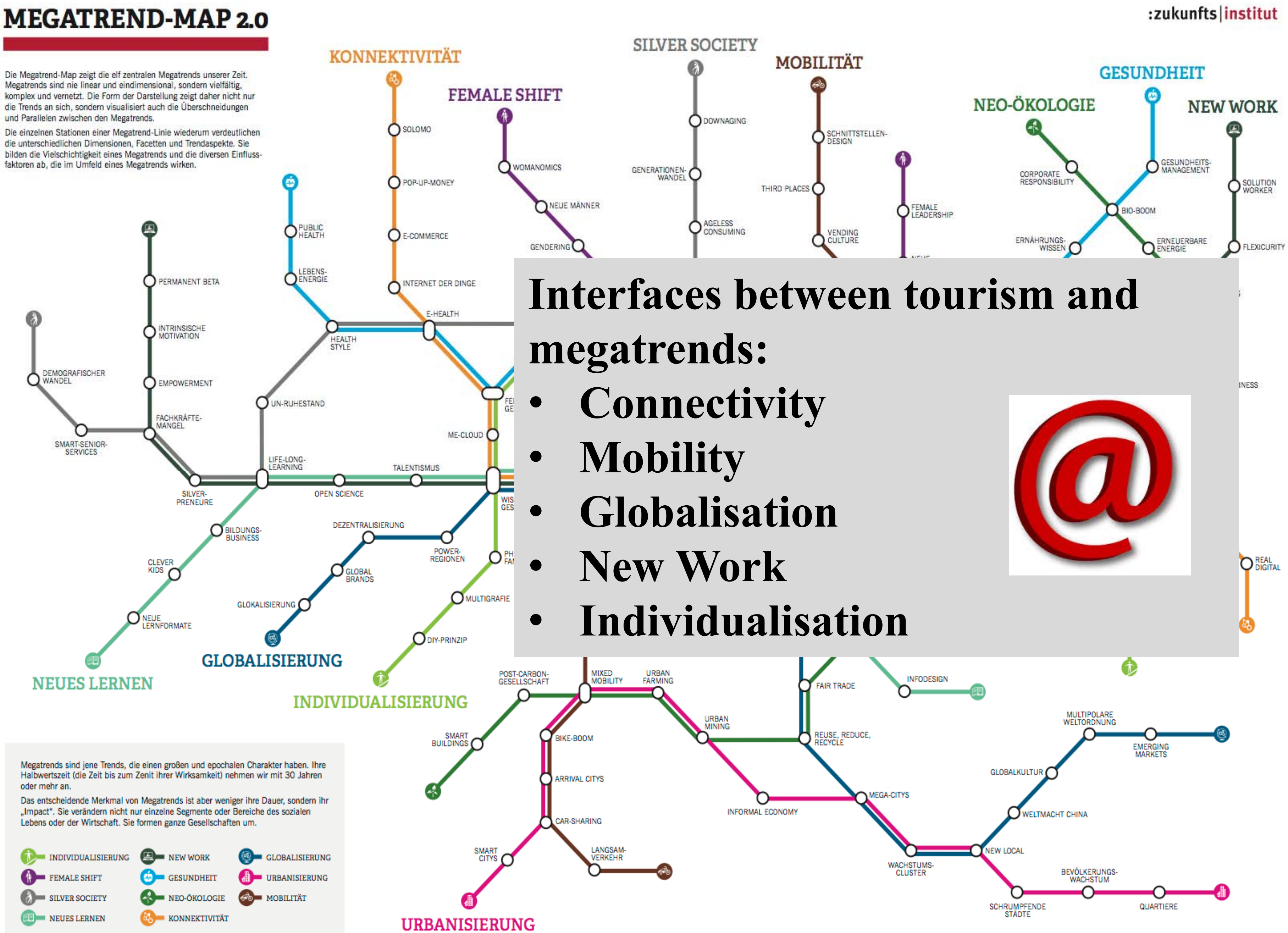
#STDRM2017
Destinos Turísticos Inteligentes (DTI):
nuevos horizontes en la investigación y gestión del turismo

Agenda

- The (e)context of tourism
- Smart destinations – definitions and visions
- Management challenges of the smart destination concept (reality check)
- Approaches to overcome barriers towards smart destination (some modest projects from Switzerland)
- Conclusions

Agenda

- **The (e)context of tourism**
- Smart destinations – definitions and visions
- Management challenges of the smart destination concept (reality check)
- Approaches to overcome barriers towards smart destination (some modest projects from Switzerland)
- Conclusions



Interfaces between tourism and megatrends:

- Connectivity
- Mobility
- Globalisation
- New Work
- Individualisation

Zukunftsinstitut / https://www.zukunftsinstitut.de/artikel/megatrend-map-die-facetten-der-new-work/

Tourism @ Megatrends -> smart initiatives
Open Innovation

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Konnektivität

SOLOMO
E-COMMERCE
INTERNET DER DINGE
FEEDBACKGESELLSCHAFT
BIG DATA
OPEN INNOVATION
COLLABORATION
FLEXIBILISIERUNG
SOCIAL NETWORKS
SMART DEVICES
DIGITAL LIFESTYLE
CROWD SOURCING

We look forward to learning about new, unusual and unconventional approaches through your ideas and to working with you to make #Vienna2020 an even more attractive city for visitors

https://2020.wien.info/Group/Ihre.Idee.Fuer.Wien.2020/Danke

eTourism @ Megatrends
Big Data

Konnektivität
SOLOMO
E-COMMERCE
INTERNET DER DINGE
FEEDBACKGESELLSCHAFT
BIG DATA
OPEN INNOVATION
COLLABORATION
FLEXIBILISIERUNG
SOCIAL NETWORKS
SMART DEVICES
DIGITAL LIFESTYLE
CROWD SOURCING

Priceline: "I certainly think 'big data' is playing an important role in enabling us to not only understand who our audience is, but when and how to interact with them"

Skift Forum Video: How TripAdvisor Uses Big Data to Personalize an Experience

Four Seasons Hotels Taps Big Data to Upsell Food and Beverage

eTourism @ Megatrends
Co-Working

Hes·so // VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Mobilität
THIRD PLACES
M-COMMERCE
CO-WORKING
E-MOBILITÄT
FLEXIBILISIERUNG
UNTERWEGSMÄRKTE
24/7-GESELLSCHAFT
CAR-SHARING

COWORKING SPACES

Coworking holiday: Coworking Spaces on Small Islands

Cocovico Coworking in Bocas del Toro, Panama

Accelerated Innovation Cycles

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

http://www.tnooz.com/article/consumer-technology-development/

Implications

Hes·so // VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- Digital media transforming the economy (jobs), society and people
- ICT as the basis of the Customer Experience 3.0 (commodities -> services -> experiences / co-creation)
- ICT as an essential service tool for tourism stakeholders
  - Simplified processes
  - Measurability of success, ROI
  - Innovation (new products and services)

Agenda

Hes·so// VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- The (e)context of tourism
- **Smart destinations – definitions and visions**
- Management challenges of the smart destination concept (reality check)
- Approaches to overcome barriers towards smart destination (some modest projects from Switzerland)
- Conclusions

Smart Destination Definition (I)

Hes·so // VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Lopez de Avila (2015) defines the smart tourism destination in the following way:

- An **innovative** tourist destination, **built on an infrastructure of state-of-the-art technology** guaranteeing the **sustainable development** of tourist areas, **accessible** to everyone, which facilitates the **visitor's interaction** with and integration into his or her surroundings, **increases the quality of the experience** at the destination, and improves residents' quality of life.

Source: Lopez de Avila, A. (2015). Smart Destinations: XXI Century Tourism. Presented at the ENTER2015 Conference, Lugano

Smart Destination Definition (II)

Hes·so // VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Gretzel et al. (2015):

Smart tourism is defined as tourism supported by integrated efforts at a destination to **collect** and **aggregate/harness data** derived from **physical infrastructure, social connections, government /organizational sources and human bodies/minds** in combination with the use of advanced technologies to **transform that data** into **on-site experiences** and **business value-propositions** with a clear focus on **efficiency, sustainability and experience**

Source: Gretzel et al. (2015). Smart tourism: foundations and developments. Electron Markets (2015) 25:179–188

Smart Destination Definition (III)

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

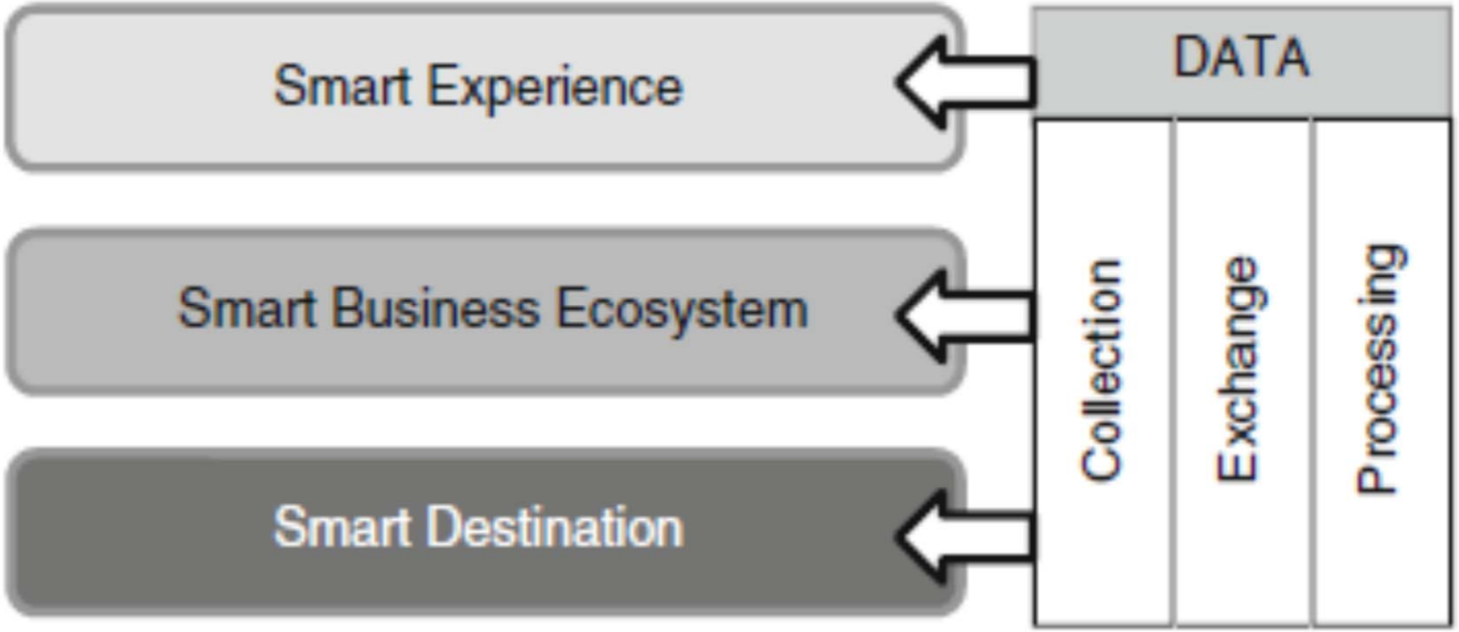
Buhalis (2015):

[…] smartness takes advantage of interconnectivity and interoperability of **integrated technologies to reengineer processes and data in order to produce innovative services, products and procedures towards maximising value for all stakeholders**. This reengineering enables shaping products, actions, **processes and services in real-time, by engaging different stakeholders simultaneously to optimise the collective performance and competitiveness** and generate agile solutions and value for all involved in the value system.

Source: Buhalis, D. (2015), "Working definitions of smartness and smart tourism destination"

Component and Layers of Smart Destination

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



Source: Gretzel et al. (2015). Smart tourism: foundations and developments. Electron Markets (2015) 25:179–188

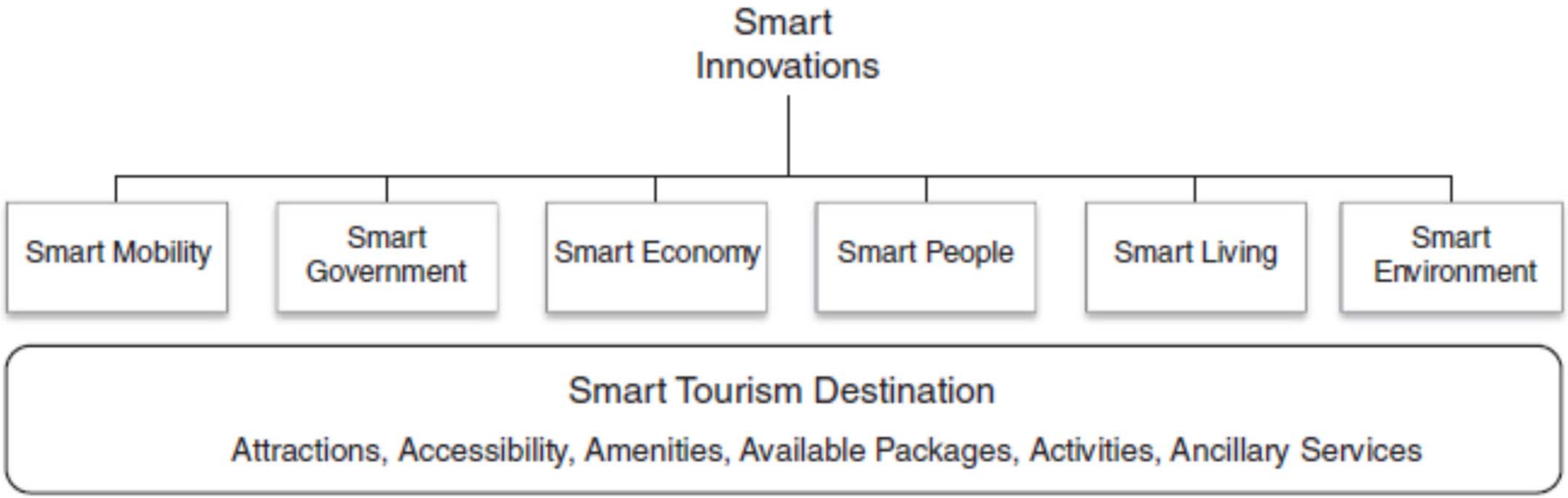
Specificities of Smart Tourism/Destination

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

	e-Tourism	Smart Tourism
Sphere	digital	bridging digital & physical
Core technology	websites	sensors & smartphones
Travel phase	pre- & post-travel	during trip
Lifeblood	information	big data
Paradigm	interactivity	technology-mediated co-creation
Structure	value chain/intermediaries	ecosystem
Exchange	B2B, B2C, C2C	public-private-consumer collaboration

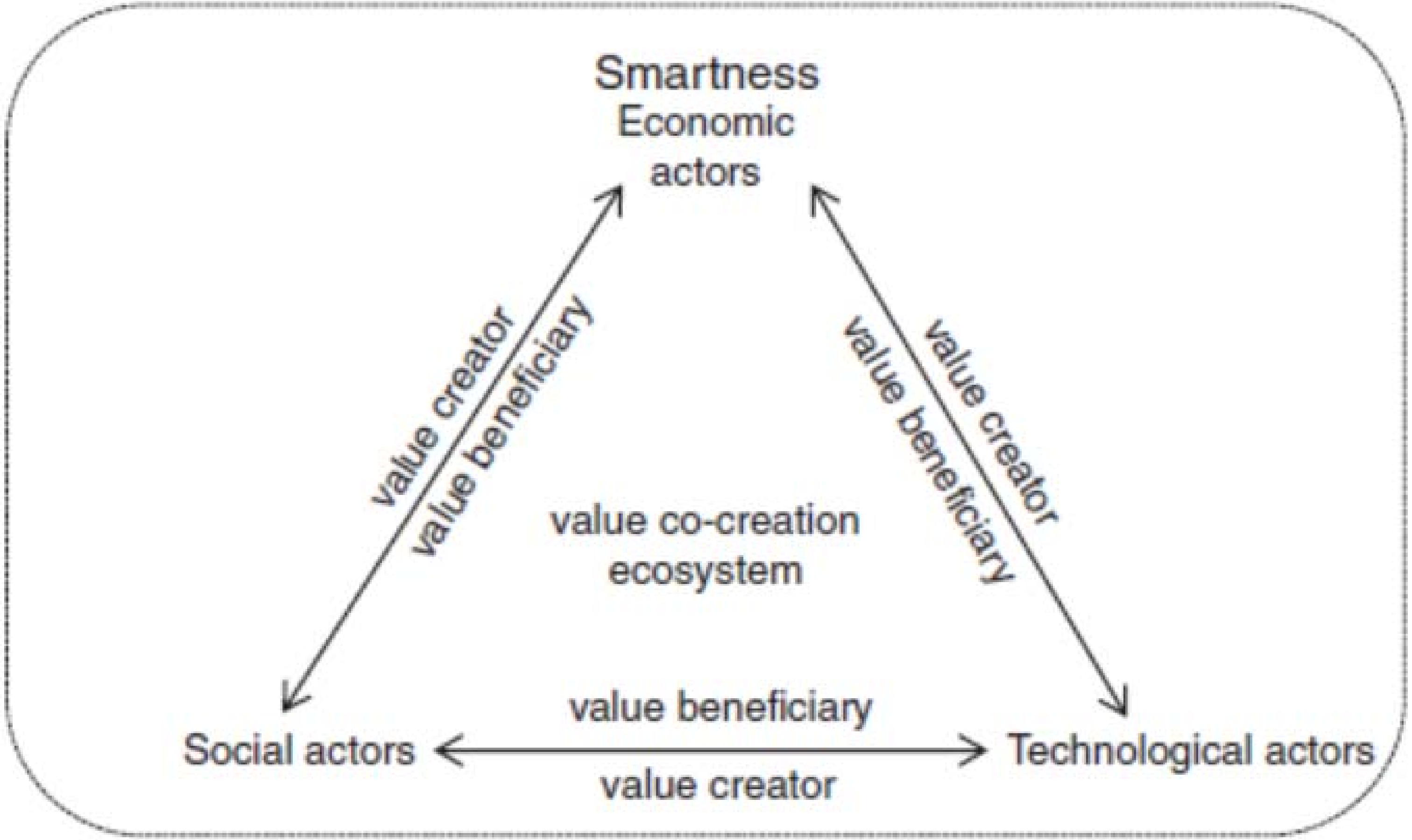
Source: Gretzel et al. (2015). Smart tourism: foundations and developments. Electron Markets (2015) 25:179–188

Smart Tourism Destinations need a lot of Smart Innovations



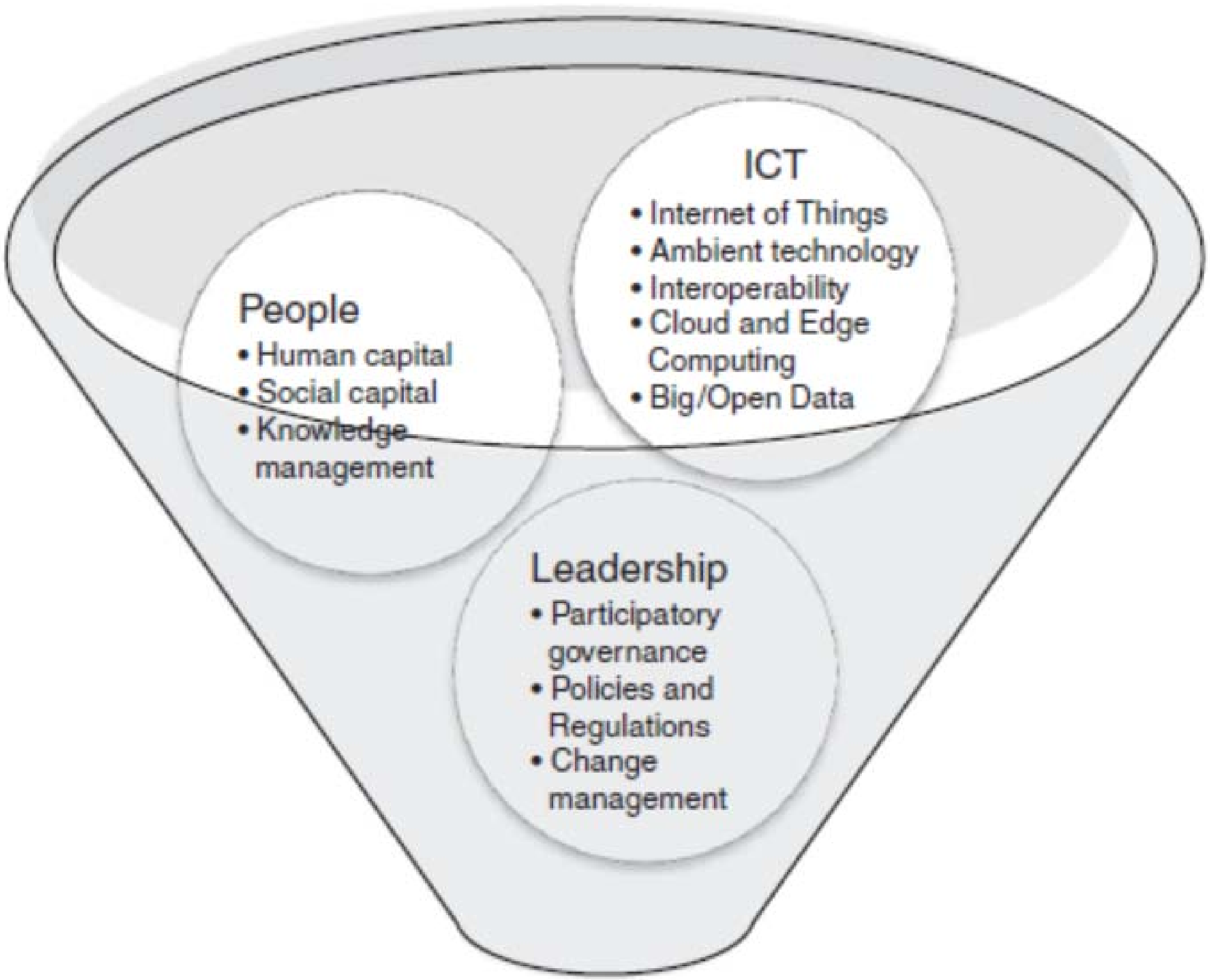
Source: Kim Boes, Dimitrios Buhalis, Alessandro Inversini, (2016) "Smart tourism destinations: ecosystems for tourism destination competitiveness"

Smart Tourism Destinations need Cooperation of all Actors to create Values



Source: Kim Boes, Dimitrios Buhalis, Alessandro Inversini, (2016) "Smart tourism destinations: ecosystems for tourism destination competitiveness"

Smart Tourism Destinations need Social and Human Capital and Leadership



Human capital: knowledge and Skills -> education; attracting knowledgeable and creative people

Social Capital: “networks together with shared norms, values and understandings that facilitate co-operation within or among groups”

Source: Kim Boes, Dimitrios Buhalis, Alessandro Inversini, (2016) "Smart tourism destinations: ecosystems for tourism destination competitiveness"

Agenda

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

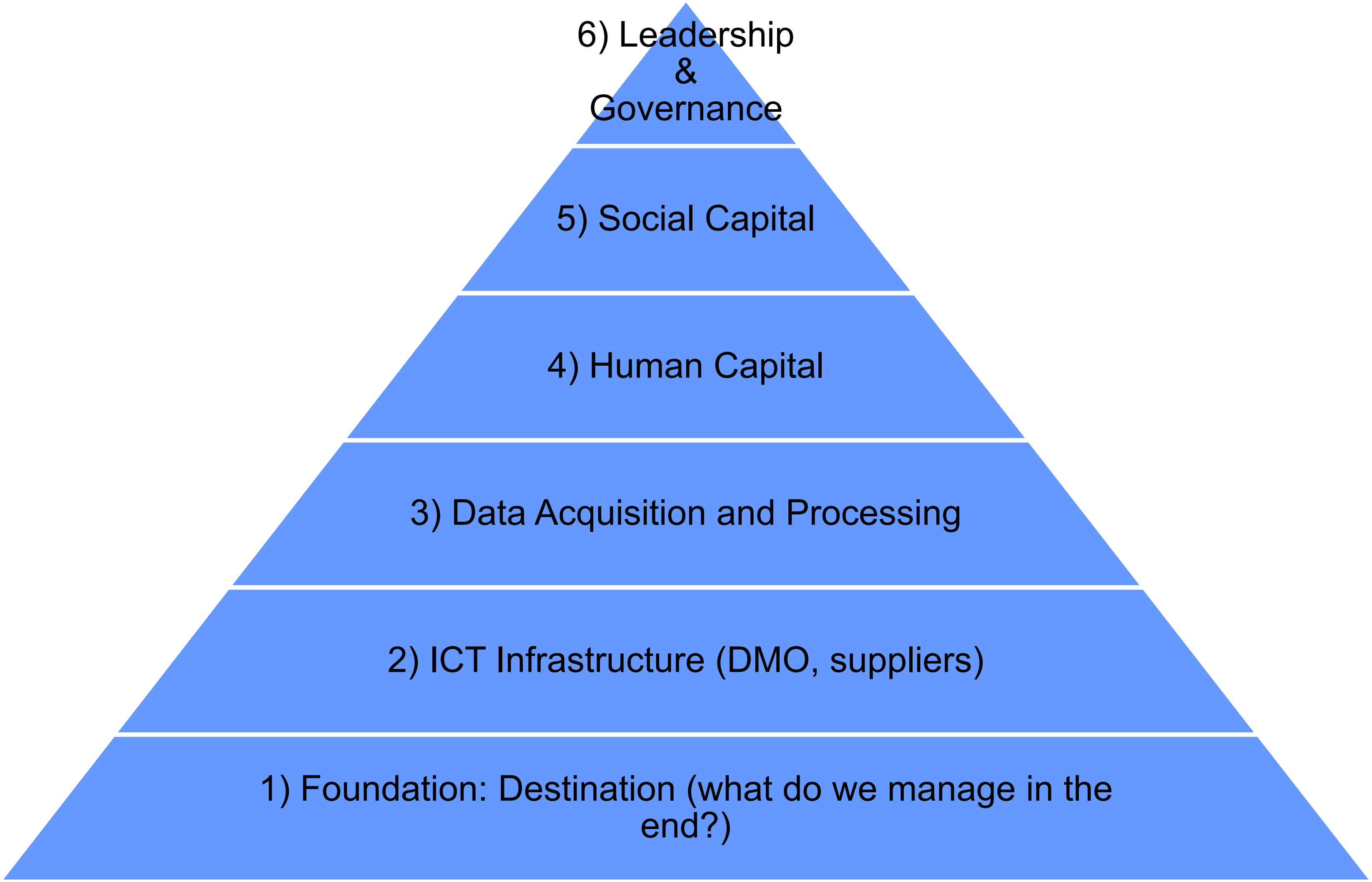
- The (e)context of tourism
- Smart destinations – definitions and visions
- **Management challenges of the smart destination concept (reality check)**
- Approaches to overcome barriers towards smart destination (some modest projects from Switzerland)
- Conclusions

Smart Destination: challenges for management

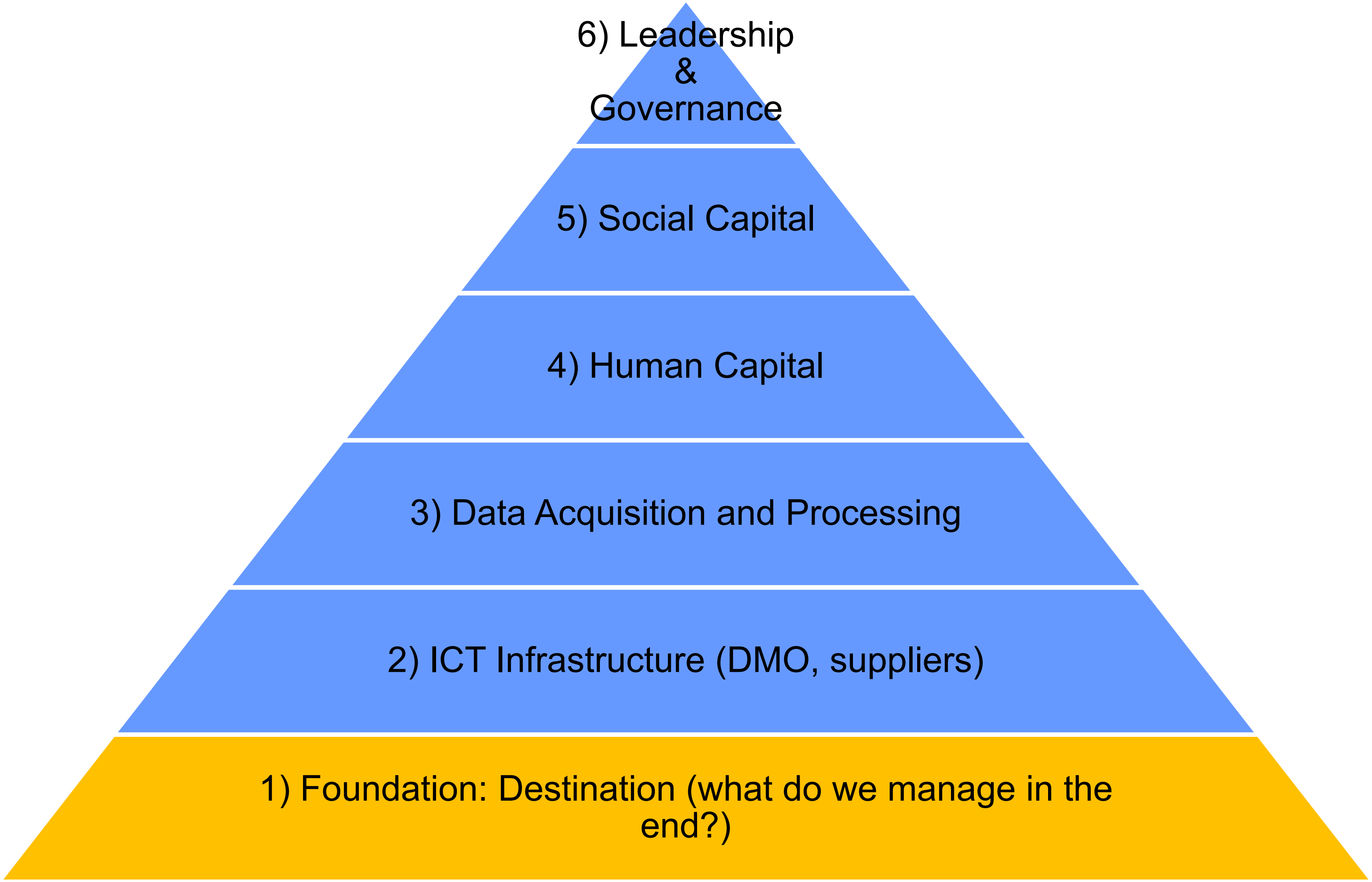
Hes·so// VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- integrated technologies / **state-of-the-art technology**
- collect and aggregate/harness **data** from physical infrastructure, social connections, government /organizational sources and human bodies/minds
- reengineer processes and data / **transform that data** into on-site experiences and business value-propositions
- engaging different **stakeholders simultaneously**
- maximising value for **all stakeholders**
- innovative services, products and procedures / actions, processes and **services in real-time**
- user perspective / visitor's interaction

Smart Destination Challenges for Management



1) Challenges for Management: What do we manage?



What is a destination?

Orientation depends on requirement

- **Geographic area (place, region, village)**
  - travel goal of guest / guest segments
- **includes all for the visit necessary infrastructure**
  - Accommodation
  - Food & Beverages
  - Amusements / things to do
- **is the actual product / the competitive unity in tourism**
- **needs to be lead as a strategic business unit**

Source: C. Laesser (2015): Destination Management and Marketing (Course Handouts). University of St. Gallen) based on Bieger (2008).

Destination management from a supply perspective

Destination Management is aimed at

- Providing an **integrated service chain**, based on points of attraction (extending gravitation)
- Put in place **coordinating mechanisms**
- Managing a **virtual company** (at the end of the day)

The supply sided foundation of destination management is provided by

- Industrial districts, Clusters or Networks and systems

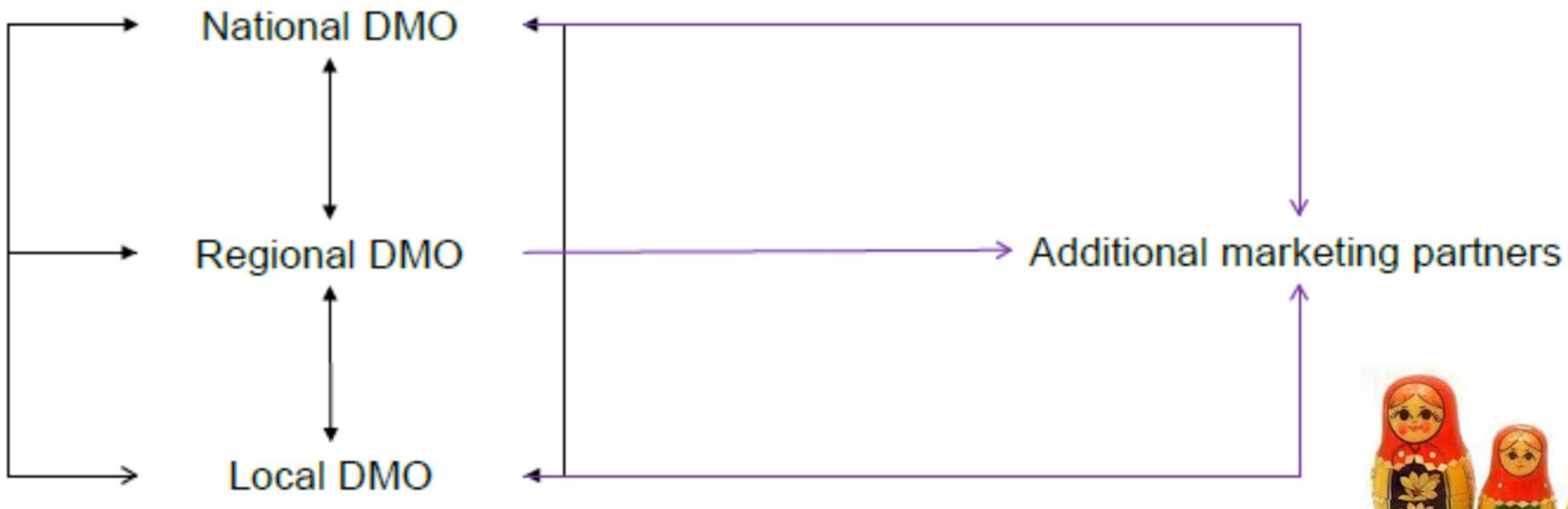
They can be co-ordinatively managed by a DMO, taking over **tasks** such as

➢ **Planning, Service coordination, Marketing, Lobbying**

Source: C. Laesser (2015): Destination Management and Marketing (Course Handouts). University of St. Gallen)

Complex DMO landscape

Different (levels of) organisations/ DMOs take over different responsibilities and tasks for differently aggregated geographic entities. However, there are many redundancies with that approach.

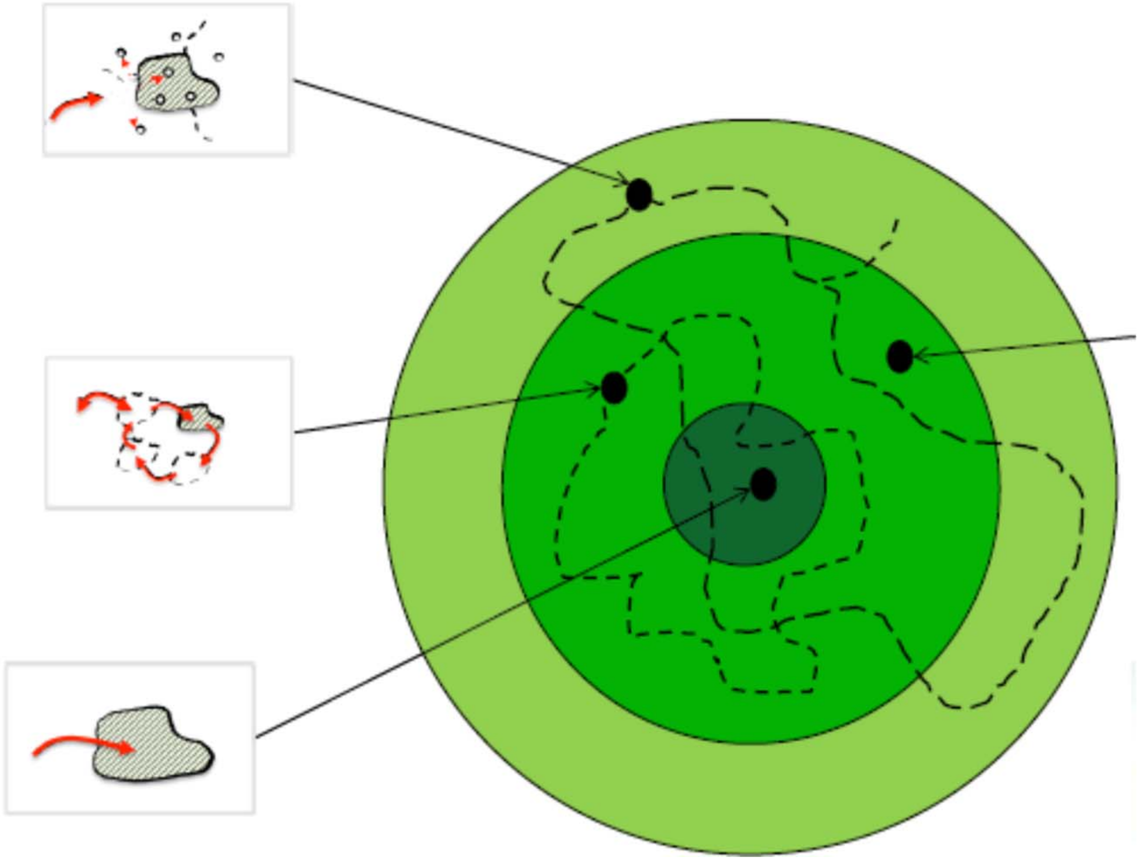


Source: C. Laesser (2015): Destination Management and Marketing (Course Handouts). University of St. Gallen)

BUT - Key of any destination formation at the end of the day is the behavioural structure of the traveller

Source: C. Laesser (2015): Destination Management and Marketing (Course Handouts). University of St. Gallen) based on Hyde & Laesser (2008).

DMOs are managed (i.e. marketing) in a structural and territorial way (instead of in a process way). BUT as tourists move across boundaries…

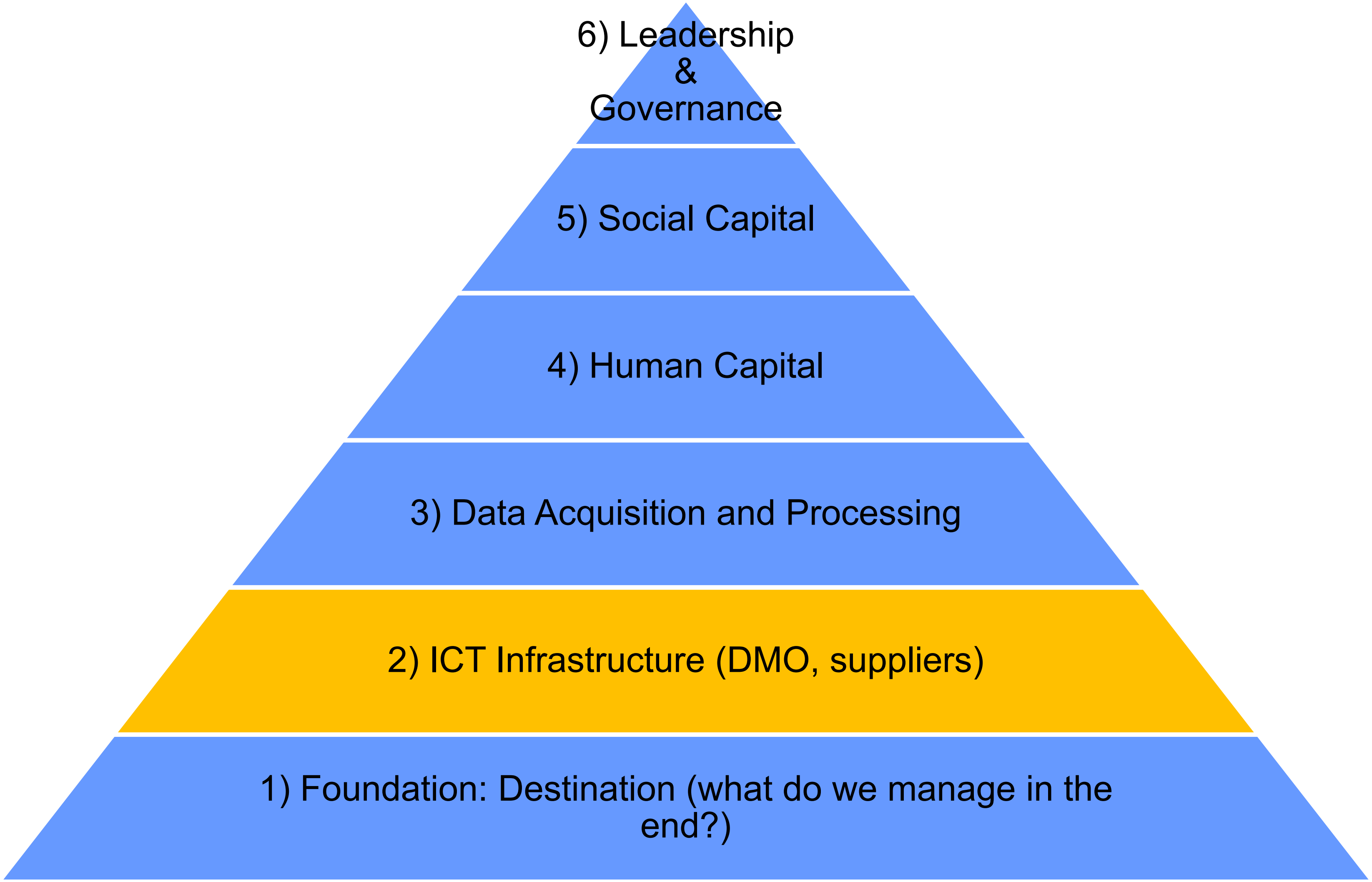


Challenge: How do smart destinations take care of guests going beyond their bounderies?

Source: C. Laesser (2015): Destination Management and Marketing (Course Handouts). University of St. Gallen).

2) Challenges for Management: State-of-the-art ICT Infrastructure

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



Smart Destinations: Technology Challenge

Bringing Smartness into Tourism Destinations **requires dynamically interconnecting stakeholders through a technological platform** on which information relating to tourism activities could be **exchange** instantly.

This integrated platform is having **multiple touch points** that could be access through a variety of end-user devices which will support the creation and facilitation of **real-time tourism experiences…**

Source: Buhalis, D., & Amaranggana, A. (2014). Smart Tourism Destinations.

Requirements for DMOs in Marketing and Distribution increase

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

2011	2012	2013	2014	2015	2016
Trade	Trade	Trade	Trade	Trade	Trade
Media	Media	Media	Media	Media	Media
Hôtel	Hôtel	Hôtel	Hôtel	Hôtel	Hôtel
Website	New Website	Website	Website	Website	New Website
Com offline	Com offline	Com offline	Com offline	Com offline	Com offline
	CRM	CRM	CRM	CRM	CRM
	Product Mgmt	Product Mgmt	Product Mgmt	Product Mgmt	Product Mgmt
		Social Media	Social Media	Social Media	Social Media
		Extranet hotelier	Extranet hotelier	Extranet hotelier	Extranet hotelier
		Booking system	Booking system	Booking system	Booking system
				Measurement	Measurement
				Campaign mgmt	Campaign mgmt
				Bloggers	Bloggers
				Content mgmt	Content mgmt
					Direct marketing
					Native program.

Source: Vincent Dubi, Geneva Tourism and Convetion

Technology Challenge: Use of Digital Marketing in Swiss DMOs (2016)

DMO Survey (n=124) in Switzerland:

- 14% of the marketing budget of the DMOs goes into **digital marketing**
- 2% of the marketing budget of the DMOs goes into **social media marketing**
- 1 person takes care of the average DMOs online marketing

Source: Walliser Tourismus Observatorium (2017), www.tourobs.ch: https://www.tourobs.ch/media/246919/dmo_survey2017_some_fr.pdf

Technology Challenge: Use of Smart Technologies in Swiss DMOs (2015)

DMO Survey (n=42) in Switzerland:

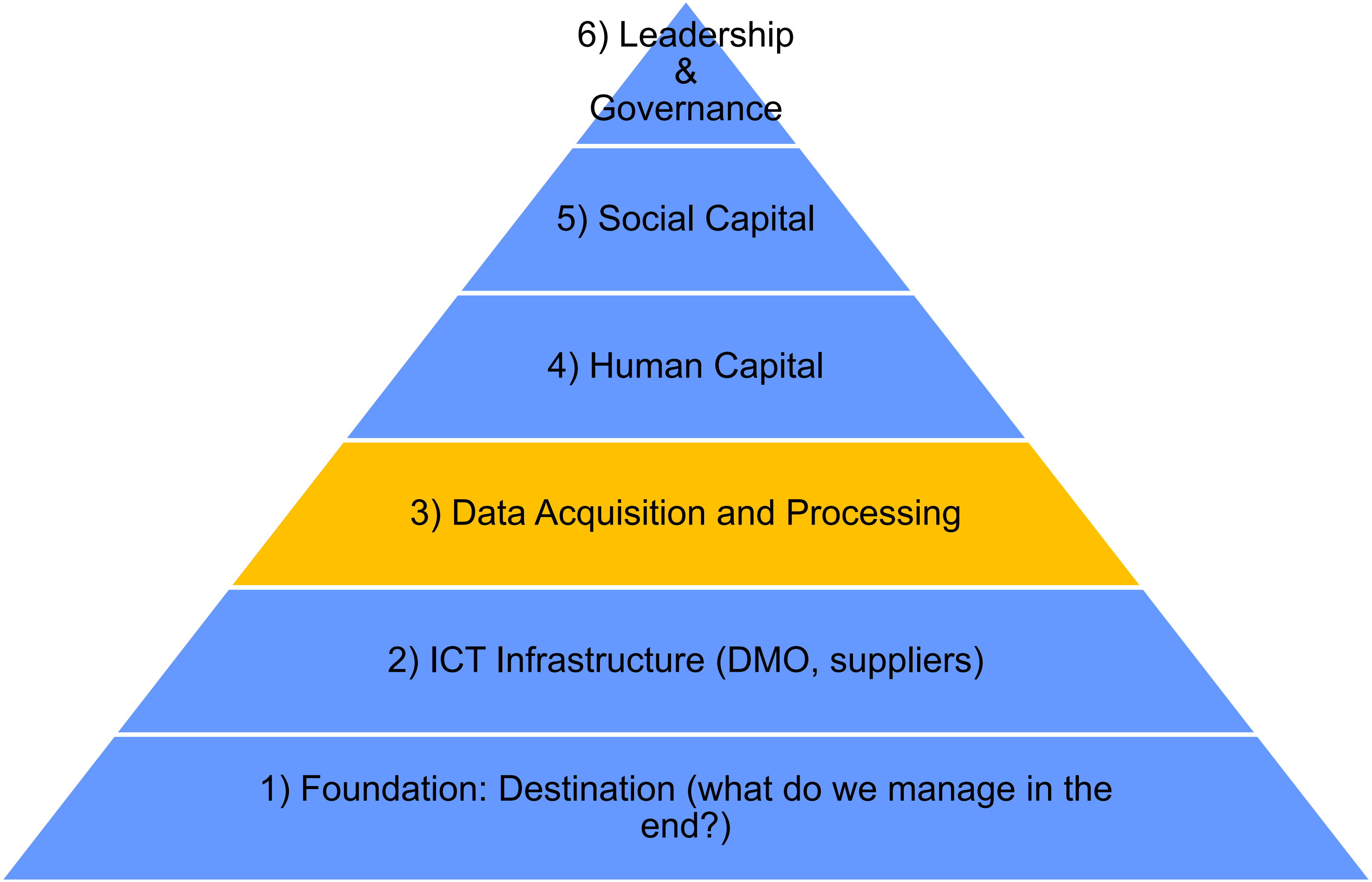
- As far as smart destination as such is concerned, **barely one in two DMOs collects data** to define and segment its visitors
- **Big data and open data, which are essential for any intelligent management, also seem anecdotal**, since 82% of respondents do not make their tourism data available for valorisation by private providers.
- Many DMOs work with **outdated DMS** (destination management systems)

Source: Walliser Tourismus Observatorium (2016), www.tourobs.ch: https://www.tourobs.ch/fr/actualites-et-articles/articles/id-4175-integration-des-technologies-smart-utilisation-et-pratiques-dans-les-organisations-touristiques-suisses/

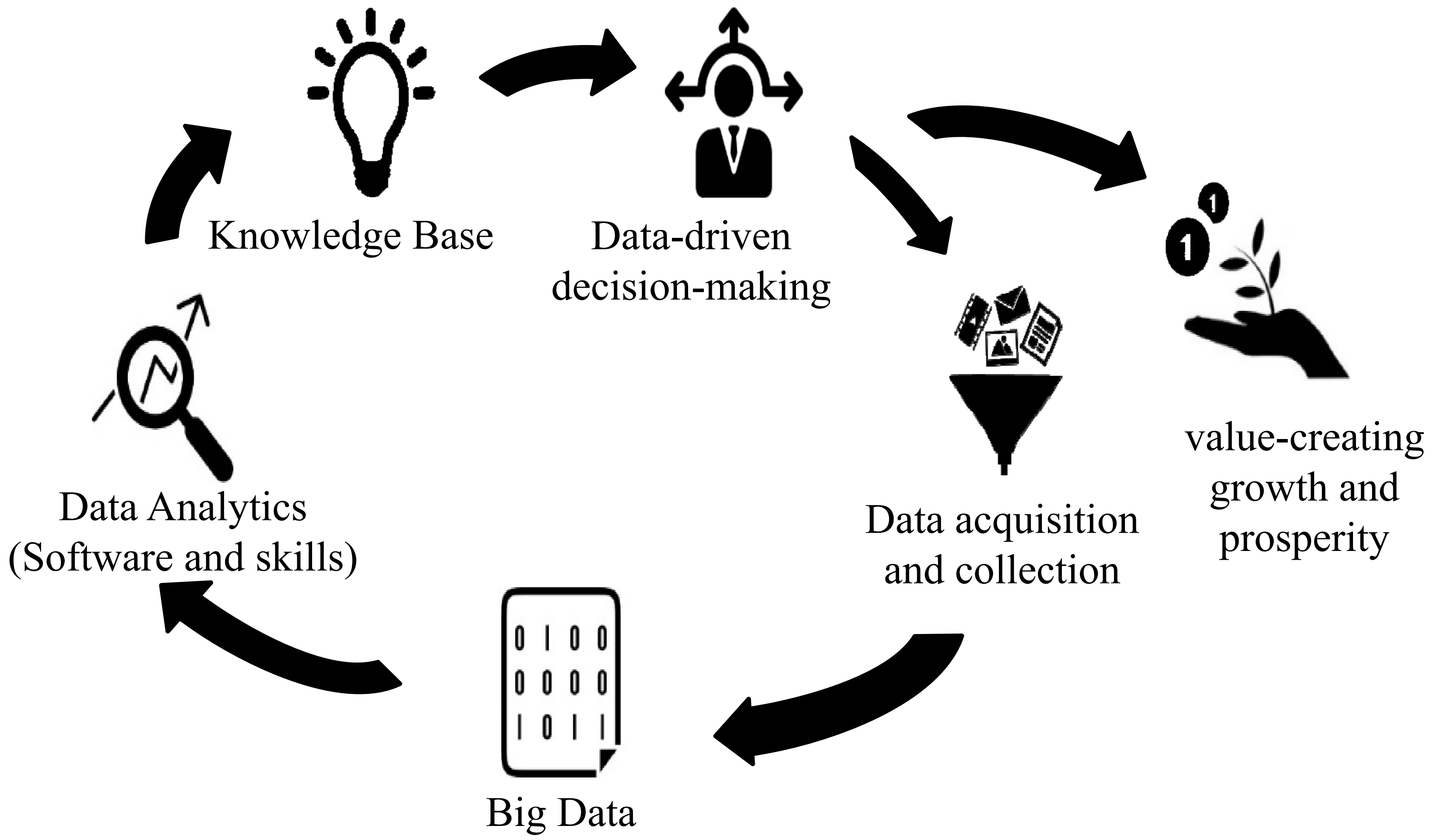
Technology Challenge: Reality Check (Switzerland)

- Except some single cases of advanced DMOs in cities (e.g. Zürich, Basel, Geneva) or mountain resorts (e.g. Zermatt, Davos, Laax), most tourism organisations are **far from the required dynamic technological platforms** for smart destinations.
- Most **suppliers** are generally **even less advanced** in the technology infrastructure and digital skills which makes the cooperation even more difficult.
  - ➢ Digital maturity of systems and organisations is very unevenly distributed in a given destination.
  - ➢ The quality of the smart experience provided is thus not homogenous.

3) Challenges for Management: Access to Data & Processing Power



Smart Destinations: Data Vision



Source: OECD (2015)

Smart Destinations: Data Challenge -> Access

Indeed the very concept of smart tourism is very much based on the assumption that **data is willingly shared by these consumers**..

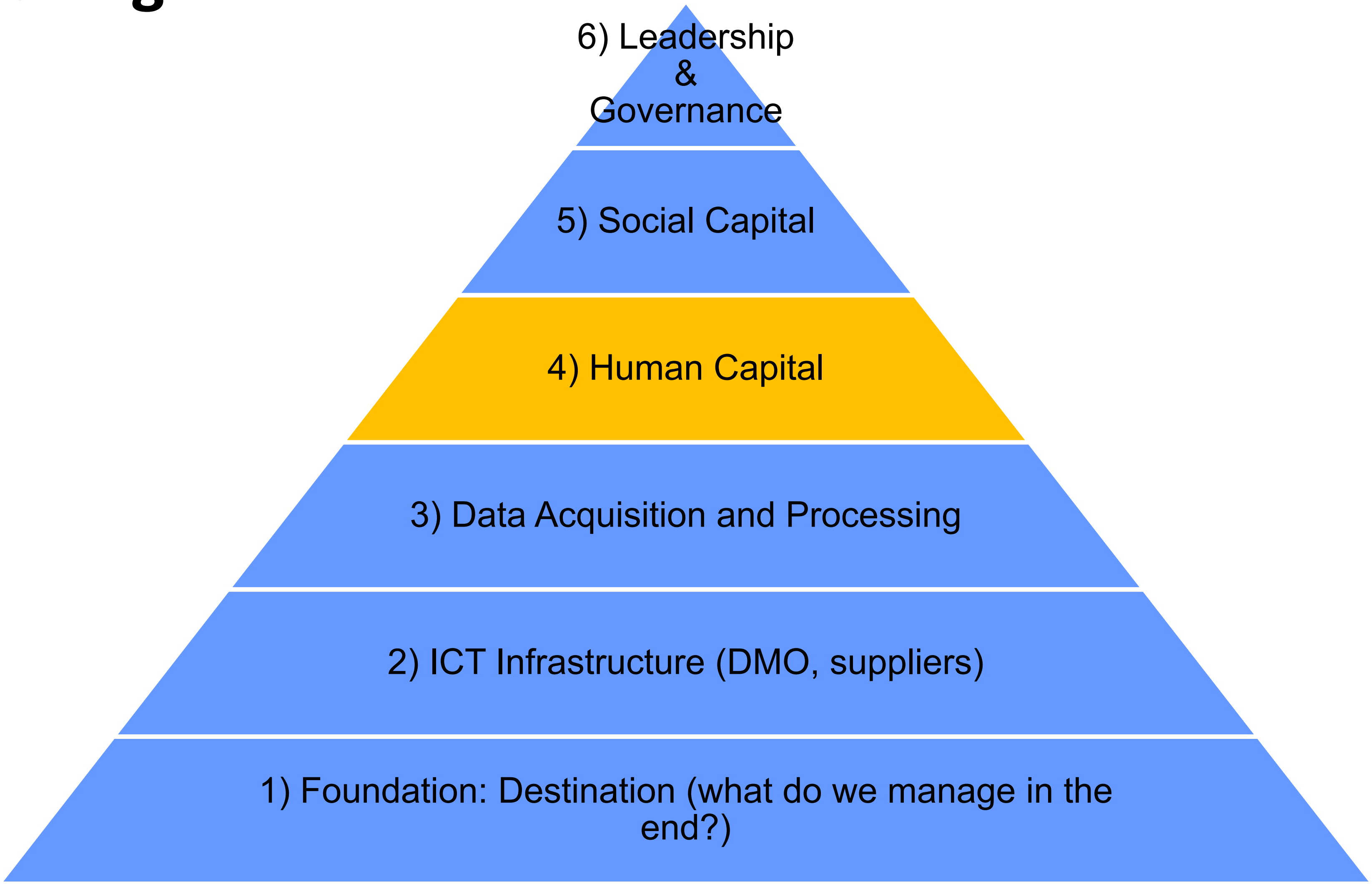
Source: Gretzel et al. (2015). Smart tourism: foundations and developments. Electron Markets (2015) 25:179–188

- **Regulatory Challenges**: General Data Protection Regulation (GDPR) for the European Union
- Most **data in silos** of **legacy systems** (difficult access)
- In most destinations, no access to **real-time data** on a destination level

Data Challenge: Reality Check (Switzerland)

- **Willingness of tourism suppliers to provide and share data** (especially real-time data) is **low** as the competitor is still the neighbor …
- Majority of tourism organizations work with **historic tourism statistics** (in Switzerland we get the overnight stats for the hotel sector 40 days after the end of the month).
- **No real-time data available in DMOs** with the exception of digital dashboards form social media (Facebook, etc.) or the website (Google analytics)
  - ➢ Real-time data still limited to global players or national players (such as telecommunication companies)

4) Challenges for Management: Skills for Data-driven Decision-making ?



Human capital -> skills

Despite great importance of new technologies, smart is not measured in relation to the investment in technology, but **considering the capacity to interpret data facilitated when applying the information obtained and implementing solutions within the destination, for being more efficient, sustainable and competitive**.

Source: Gahr et al. (2013): Smart Destinations. The Optimisation of Tourism Destination Management.

Human Capital Challenge: Reality Check (Switzerland)

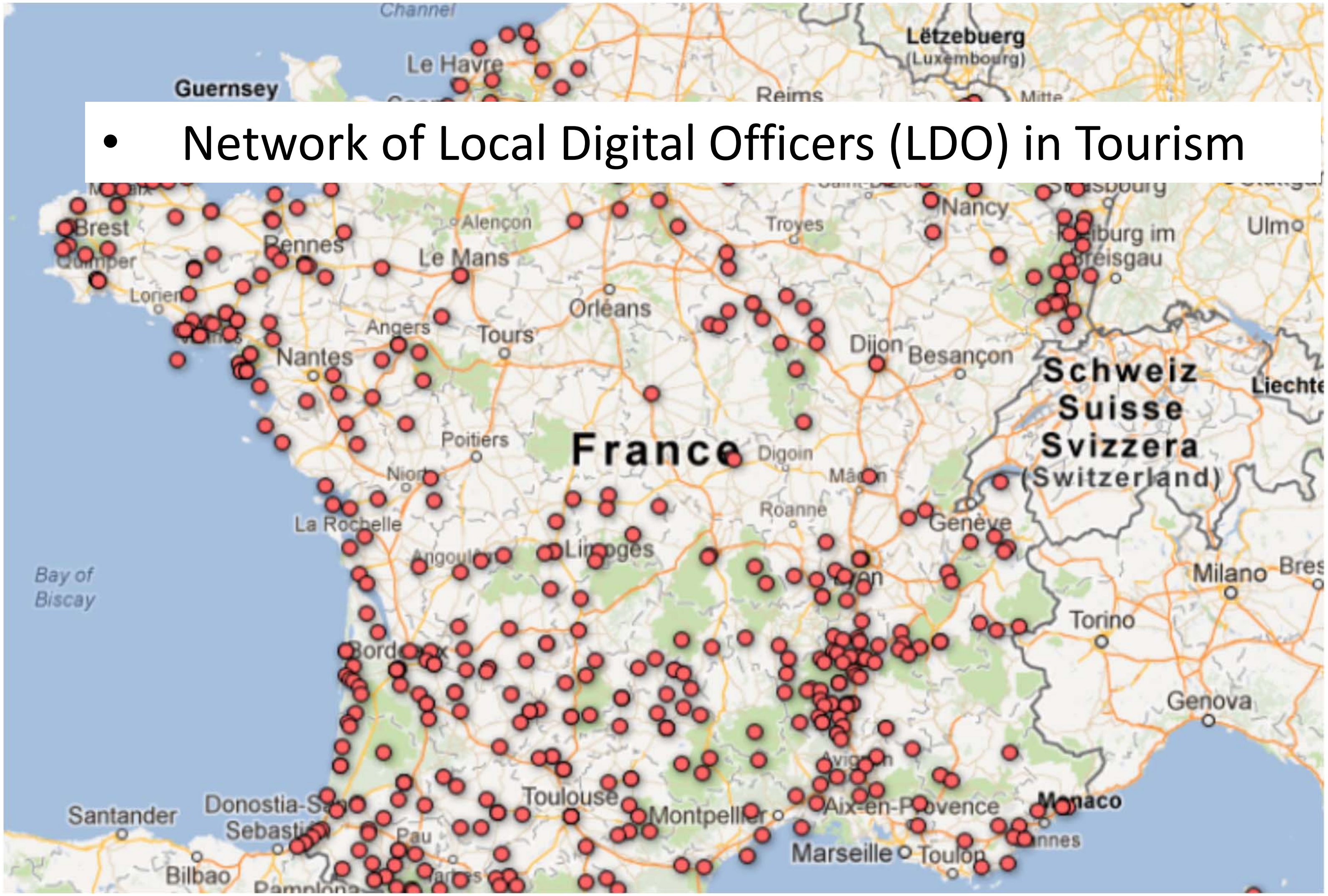
Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- Dealing with large data sets requires the **know-how of data specialists**, so that the data can be integrated and analyzed across several systems.
- Many **tourism SMEs and tourism organization lack the specialists** for this.
  - ➢ Missing vision, missing resources, educational level
- If tourism SMEs do not try to learn from their guest data, there is a **risk that global online players** such as Google, Facebook or booking. com will for the time being know more about guests than local companies.

Best Practice France: Digital Tourism Transformation

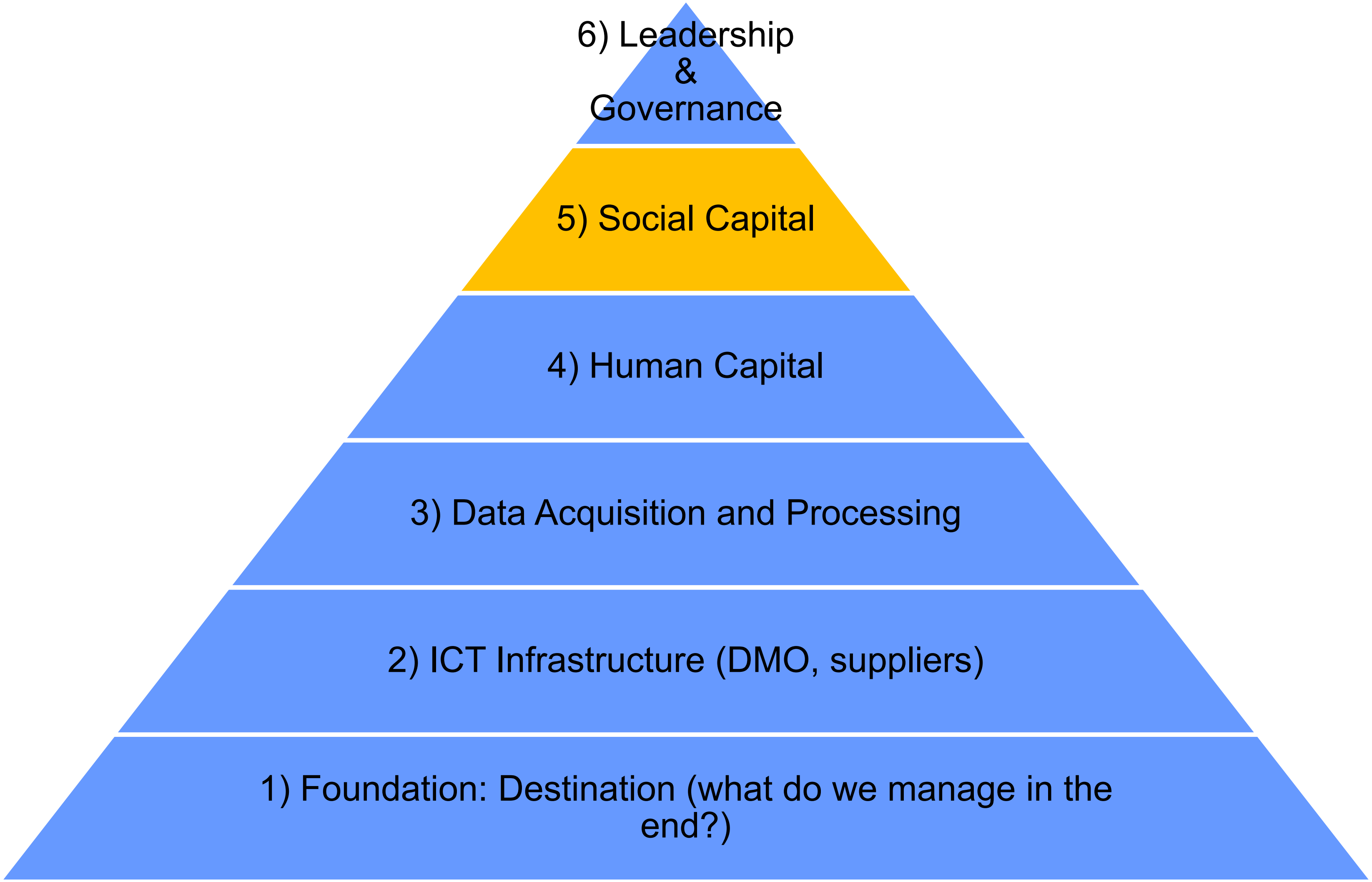
Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- Network of Local Digital Officers (LDO) in Tourism



Jean-Luc Boulin (2015): What strategies to dynamize a destination digitally? ENTER2015, Lugano

5) Challenges for Management: Willingness to work in Networks



Social Capital Challenge: Reality Check (Switzerland)

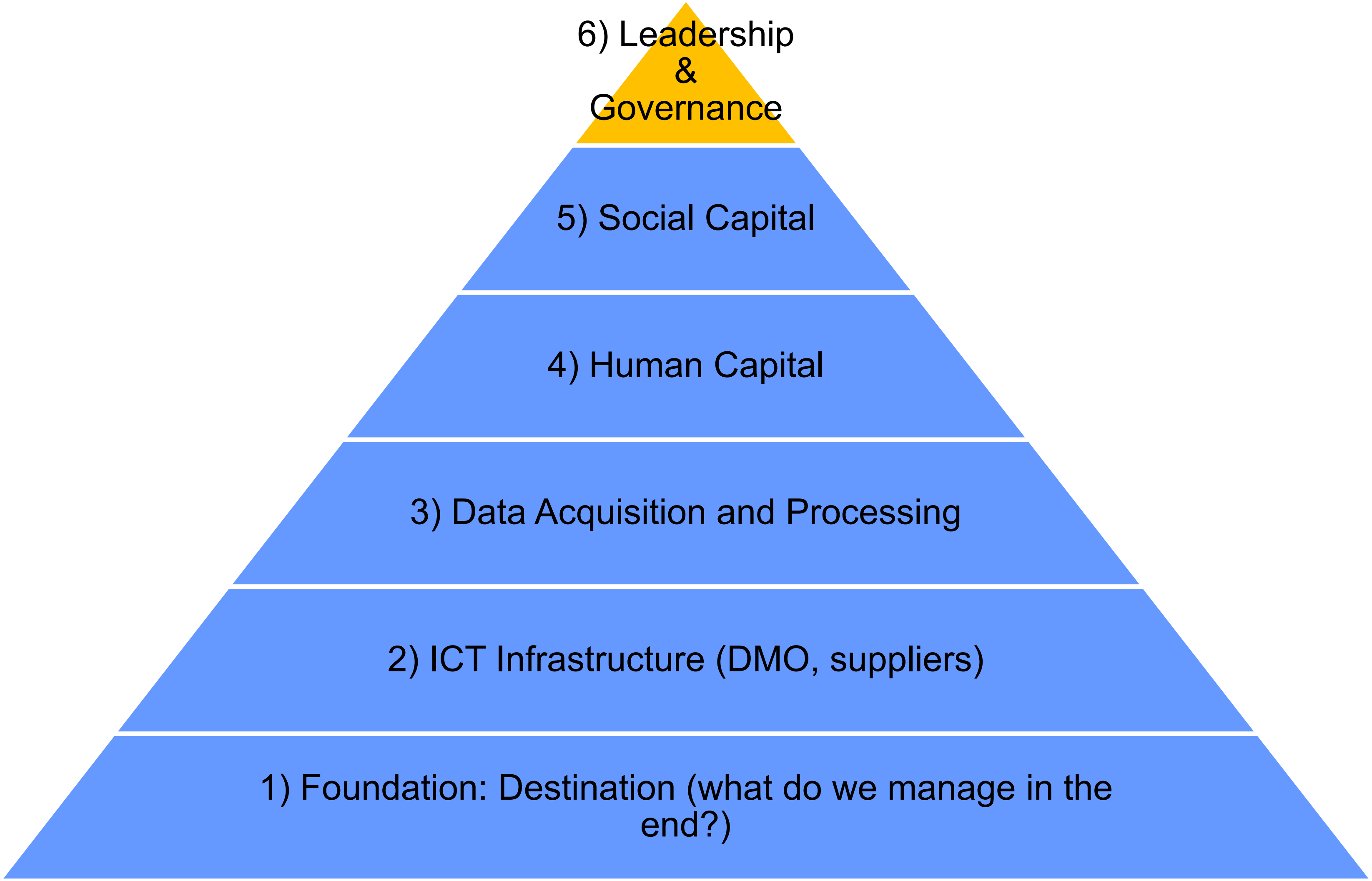
- Collaboration and cooperation are at the forefront in smart cities/destinations, BUT
  - ➢ Yet the core problems are the small-scale structure of the actors (SME) and offers in the sector, the **lack of cooperation within tourism and with other sectors** of regional economic importance, as well as the lack of clear market positioning not only of the tourism service providers but also of the entire region.

Social Capital Challenge: Reality Check (Switzerland)

- Barriers for cooperation in Swiss Tourism
  - **Lack of time**: Managers often lack the necessary time to enter into cooperations because they are strongly involved in day-to-day business.
  - The idea of competition: Cooperation partners at the same value-added stage are also **competitors**.
  - **Lack of trust**: Trust is considered very important by respondents and is one of the most important prerequisites for cooperation.
  - Rejection of **changes**
  - Lack of **opening of organisational borders**
  - Fear of **losing entrepreneurial independence**

6) Challenges for Management: Smart Governance?

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



Smart Destinations: PPP key for success

Public–Private Partnership (PPP) is essential when running a Smart Tourism Destinations initiative. The operational advantages are that PPP fosters efficiency, support creativity and induce innovation to flourish

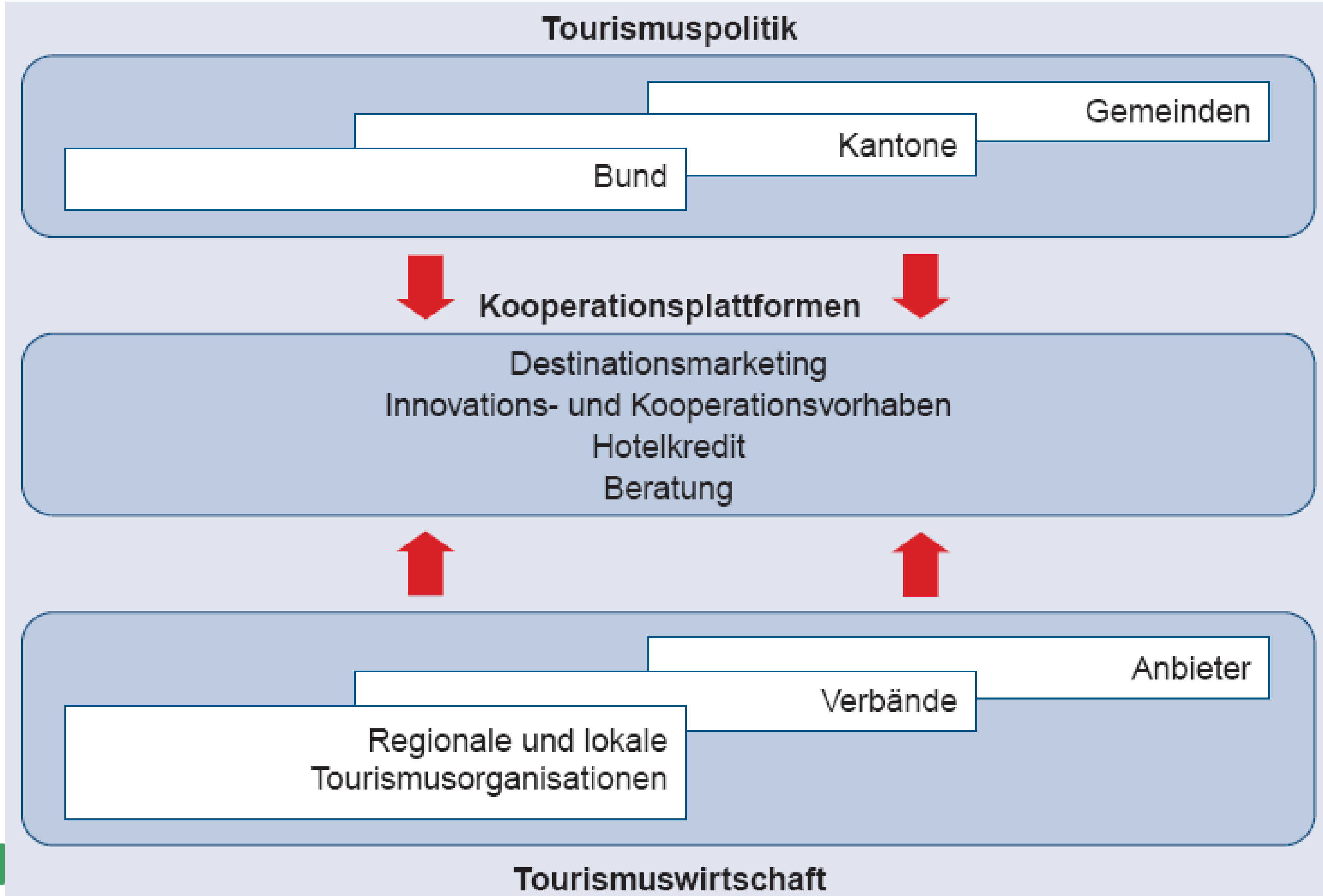
Source: Buhalis, D., & Amaranggana, A. (2014). Smart Tourism Destinations.

The analysis indicates Barcelona, Amsterdam and Helsinki implement a combination of **top-down and bottom-up leadership** in which participatory governance is promoted. The **central smart city offices guide and monitor smart city projects** to empower the community to co-create and co-develop innovations to real-life problems and issues.

Source: Kim Boes, Dimitrios Buhalis, Alessandro Inversini, (2016) "Smart tourism destinations: ecosystems for tourism destination competitiveness"

Leadership and governance Challenge: Reality Check

- Switzerland is the land of PPP and bottom-up / top-down policies



Leadership and governance Challenge: Reality Check

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- Despite a **smart policy framework** , we do not have a lot of real advanced smart destination cases…
- Possible reasons:
  - Lack of a smart leader (DMOs still in the traditional role)
  - Missing human and social capital (discussion above)
  - PPP projects not always sustainable (after initial state financing)

Agenda

- The (e)context of tourism
- Smart destinations – definitions and visions
- Management challenges of the smart destination concept (reality check)
- **Approaches to overcome barriers towards smart destination (some modest projects from Switzerland)**
- Conclusions

Smart projects for smart DMOs and suppliers

1) Public projects with private participation

- Valais Tourism Observatory (from regional data to knowledge and business intelligence for the suppliers)

2) PPP projects (public-private partnerships)

- Digital Fitness (human capacity building in ICT and smart skills)
- Valais Booking (regional booking and channel management platform from the hotel association)
- Open Booking (local-regional meta-search solution)
- Strategic visitor flow in Fribourg (telecommunication data and guest card data)

3) DMO-Industry Partnership: Zurich Tourism as enabler for partners

Smart projects for smart DMOs and suppliers

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

1) Public projects with private participation

- Valais Tourism Observatory (from regional data to knowledge and business intelligence for the suppliers)

2) PPP projects (public-private partnerships)

- Digital Fitness (human capacity building in ICT and smart skills)
- Valais Booking (regional booking and channel management platform from the hotel association)
- Open Booking (local-regional meta-search solution)
- Strategic visitor flow in Fribourg (telecommunication data and guest card data)

3) DMO-Industry Partnership: Zurich Tourism as enabler for partners

Valais Tourism Observatory - a tool towards smartness

www.tourobs.ch

- 2010-2011: working group with stakeholders, regional gov and university to set-up concept of observatory; industry survey and public events
- Creation of observatory in 2012 (financed by canton of Valais)
- Co-financing through projects with industry associations and also suppliers

VISION

MISSION

5 STRATEGIC AXES

The actions of the observatory are directly involved in **identifying new trends**, with the aim of **stimulating stakeholders and strengthening the competitiveness** of mountain tourism in the Valais.

Through the **systematic acquisition of data**, the Observatory provides tourism stakeholders with **decision-support tools**. The OVT is thus actively contributing to the **professionalization** of the sector.

Collect	Know Offer
Valorise	Know demand
Identify	Know client
Inform	Anticipate the futur
Support	Mesure the performance

Observatory – regional benchmarks and dashboards

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Provenance des hôtes en Valais, Oberland bernois et Grisons

	Valais			Oberland Bernois			Grisons	
	9.2014	9.2014 vs. 9.2013	Part de marché	9.2014	9.2014 vs. 9.2013	Part de marché	9.2014	9.2014 vs. 9.2013
Suisse	195122	6.15%	60.31%	156674	4.72%	42.77%	248346	-1.06%
Allemagne	36692	0.94%	11.34%	34723	-7.76%	9.48%	86023	-11.76%
Royaume-Uni	13693	-4.30%	4.23%	28082	-2.68%	7.67%	9284	-4.52%
Etats-Unis d'Amérique	12032	5.27%	3.72%	25386	-1.76%	6.93%	8994	10.64%
Chine (sans Hongkong)	2631	10.41%	0.81%	21290	5.31%	5.81%	975	-20.08%
Japon	7461	-15.63%	2.31%	11933	-7.85%	3.26%	3752	-9.31%
Pays-Bas	4454	-10.15%	1.38%	5722	-9.89%	1.56%	6610	12.63%
France	11355	-4.51%	3.51%	5125	-5.27%	1.40%	3185	-2.15%
Inde	599	27.99%	0.19%	3998	9.41%	1.09%	205	-26.79%

Observatory – dashboards for all stakeholder segments on regional level

Tableau de bord du tourisme en valais

Hôtellerie

Mars 2017 — 431'395 nuitées ↓
vs. 2016 — -4.81% (-21'786) ↓
vs. moyenne — -2.38% (-10'526) ↓

ℹ Source des données: Statistique HESTA (Office fédéral de la statistique)
ℹ La comparaison à la moyenne correspond à la moyenne des résultats pour les trois dernières années.
ℹ Prochaine publication: 06.06.2017

Agences de location

Avril 2017 — 104'959 nuitées ↑
vs. 2016 — +108.77% (+54'683) ↑
vs. moyenne — +37.02% (+28'355) ↑

ℹ Source des données: Panel der Parahotellerie des Walliser Tourismus Observatoriums
ℹ La comparaison à la moyenne correspond à la moyenne des résultats pour les trois dernières années.
ℹ Les informations sur les nuitées de nos panels sont mises à jour dans la nuit du 6 au 7 de chaque mois.

Réservations en agences de location

Etat au 8.5.2017 — 206'630 nuitées ↓
vs. 2016 — -7.25% (-16'147) ↓
vs. moyenne — +0.70% (+1'437) ↑

ℹ Source des données: Panel des agences de location de l'Observatoire Valaisan du Tourisme
ℹ La comparaison à la moyenne correspond à la moyenne des résultats pour les trois dernières années.
ℹ Les informations sur les réservations sont mises à jour toutes les semaines dans la nuit du lundi au mardi.

Nuitées touristiques globales

2014 / 2015 — 13'503'983 nuitées ↑
vs. 2014 — +0.50% (+67'139) ↑

ℹ Source des données: Offices du tourisme valaisans

Journées skieurs (30.4.2017)

Hiver 2016/2017 — 8'234'188 journées ↑
vs. Hiver 2015/2016 — +1.46% (+118'681) ↑
vs. moyenne — -1.31% (-109'385) ↓

ℹ Source des données: Sociétés de remontées mécaniques valaisannes
ℹ La comparaison à la moyenne correspond à la moyenne des résultats pour les trois dernières années. ℹ Prochaine publication: mi-mai

Bains et piscines

Avril 2017 — 88'899 entrées ↑
vs. 2016 — +20.73% (+15'264) ↑
vs. moyenne — +4.98% (+4'220) ↑

ℹ Source des données: Panel bains et piscines de l'Observatoire Valaisan du Tourimse
ℹ La comparaison à la moyenne correspond à la moyenne des résultats pour les trois dernières années.
ℹ Les informations sur les nuitées de nos panels sont mises à jour dans la nuit du 6 au 7 de chaque mois.

Observatory – personalized dashboards for single DMO

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Observatoire Valaisan du Tourisme — Langue —

Dashboard - Demo

Imprimer — Ouvrir l'ensemble du tableau de bord

1. Hôtellerie

Mars 2017

Nuitées	164 567	-4.56%	↓
Taux d'occupation	68.82%	-6.16%	↓

Source des données: Office Fédéral de la Statistique - Statistique HESTA

2. Agences de locations

Avril 2017

Nuitées	8 150	49.51%	↑

Source des données: Panel non-exhaustif mis en place par l'Observatoire Valaisan du Tourisme.

3. Etat des réservations à 6 mois

Avril 2017

Etat des réservations à 6 mois	20 801	21.08%	↑
Etat des réservations à 6 mois en Valais	230 036	-3.92%	↓

Source des données: Panel non-exhaustif mis en place par l'Observatoire Valaisan du Tourisme.

4. Nuitées touristiques

2015 / 2016

Nuitées Hôtellières	1 307 673	-2.21%	↓
Parahôtellerie	141 128	3.34%	↑
Forfaits propriétaires	45 000	0.00%	↑
Total de nuitées	1 493 801	-1.64%	↓

Source des données: Observatoire Valaisan du Tourisme
Chiffres saisis une fois par année par l'Observatoire Valaisan du Tourisme durant les mois de février et de mars.

5. Remontées mécaniques

Installations ouvertes (10.05.2017)	5 / 52
Km de pistes ouvertes (10.05.2017)	11 / 360
Journées skieurs	

Source: Snow Report de Suisse Tourisme
Source: Skidata

6. Mobilité

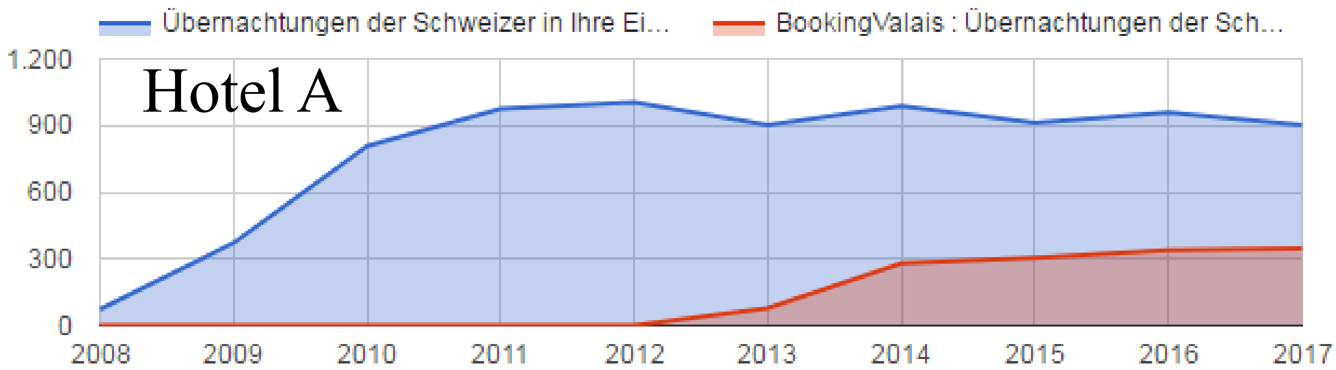
Février 2017

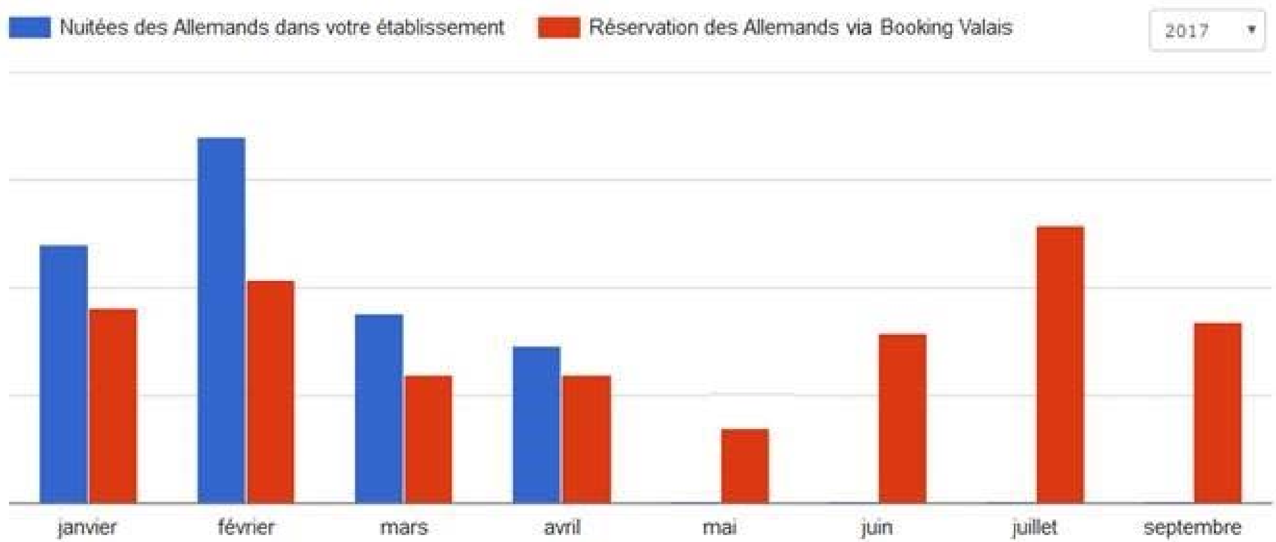
Ferroutage Furka	12.00%	↑
Arrivées MGB à Zermatt	7.84%	↑
Passagers GGB	7.84%	↑

Source: Matterhorn Gotthard Bahn

Observatory – dashboards on supplier level

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



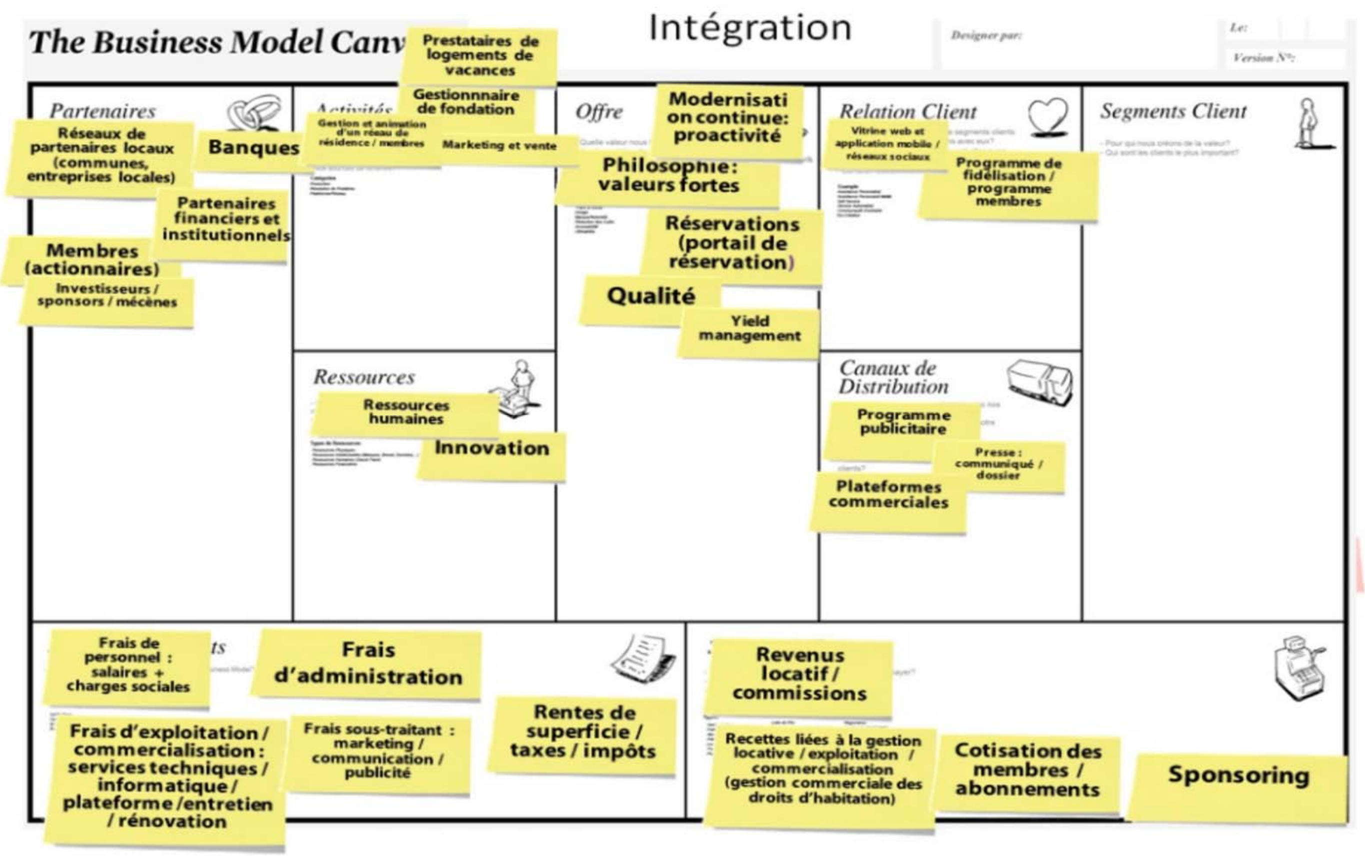


Observatory – working on Human Capital

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- Not sufficient to privide tools and data
- A need to **educate suppliers and stakeholders on how to use data for management**
- Continous education programs

Valais Tourism Observatory – Business Model Innovation Support



Constantly knowing and optimizing your business model = a form of permanent innovation

https://www.tourobs.ch/fr/faits-et-chiffres/clients/soutien-a-l-innovation/business-model-innovation/

Smart projects for smart DMOs and suppliers

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

Public projects with private participation

- Valais Tourism Observatory (from regional data to knowledge and business intelligence for the suppliers)

PPP projects (public-private partnerships)

- Digital Fitness (human capacity building in ICT and smart skills)
- Valais Booking (regional booking and channel management platform from the hotel association)
- Open Booking (local-regional meta-search solution)
- Strategic visitor flow in Fribourg (telecommunication data and guest card data)

DMO-Industry Partnership: Zurich Tourism as enabler for partners

Digital Fitness – Working on the Human Capital

- Project supported 50% by Swiss Government (Innotour) and 50% by private stakeholders (10 DMOs from Switzerland) -> PPP
- Concept developed by university together with stakeholders

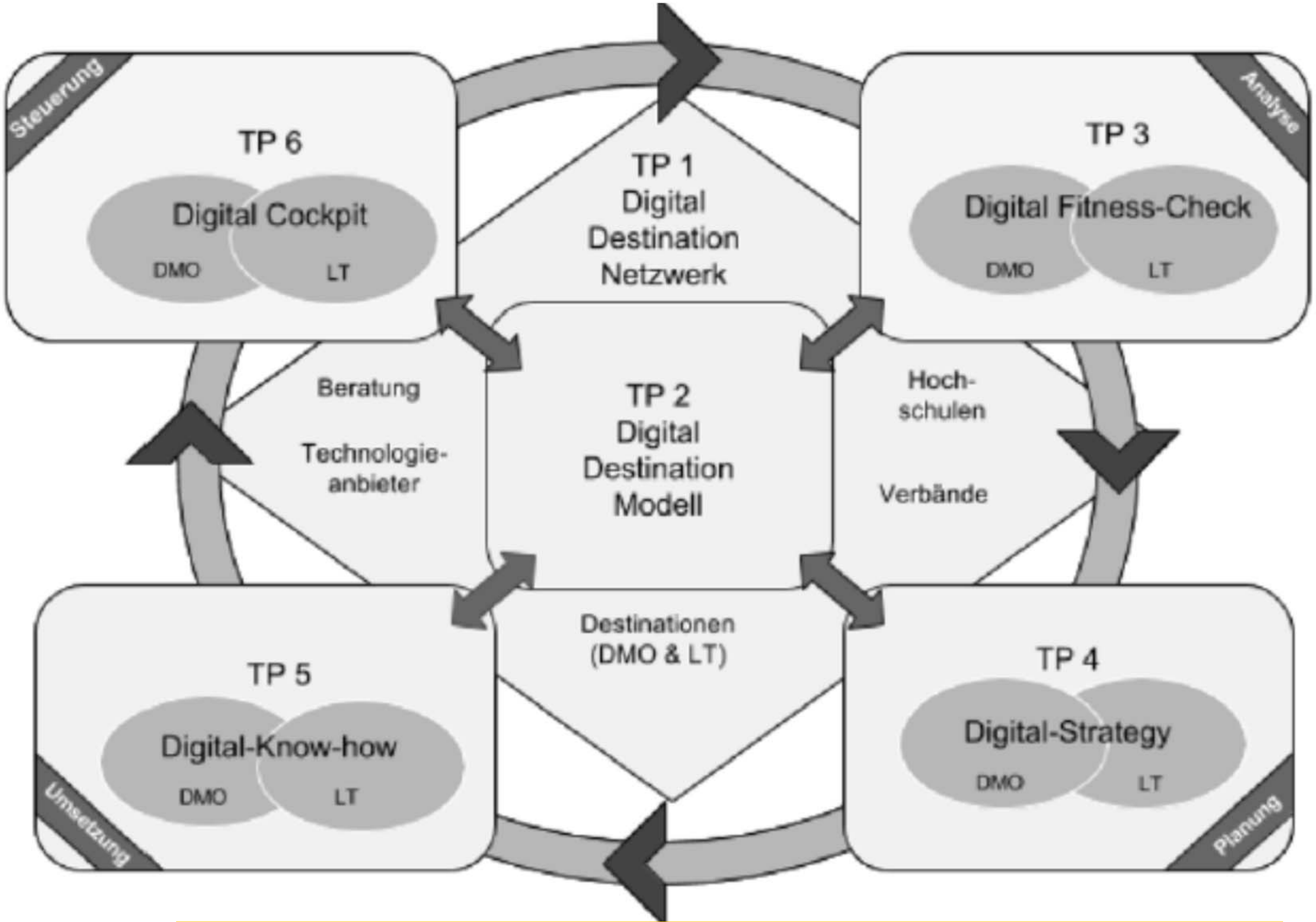
- **1. Situation Analysis (eFitness Check)**
- **2. Identify Weaknesses and strengths and implement measures**

- **4. Indep. and individual Coaching**
- **3. Strengthen digital know-how (courses)**

http://regiosuisse.ch/sites/default/files/2017-09/L7S%C3%A9ance2CoSFMichaelFux240817.pdf

Digital Fitness – Working on the Human Capital

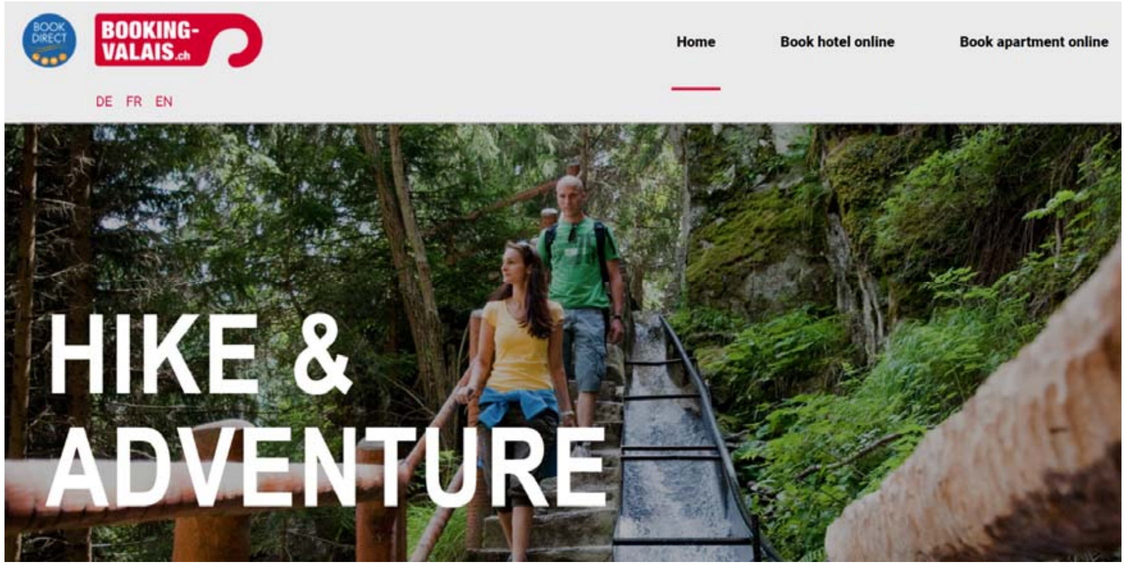
Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



All tourism stakeholder involved (DMOs & suppliers)

http://regiosuisse.ch/sites/default/files/2017-09/L7S%C3%A9ance2CoSFMichaelFux240817.pdf

Booking Valais – a regional «OTA» created by a hotel association

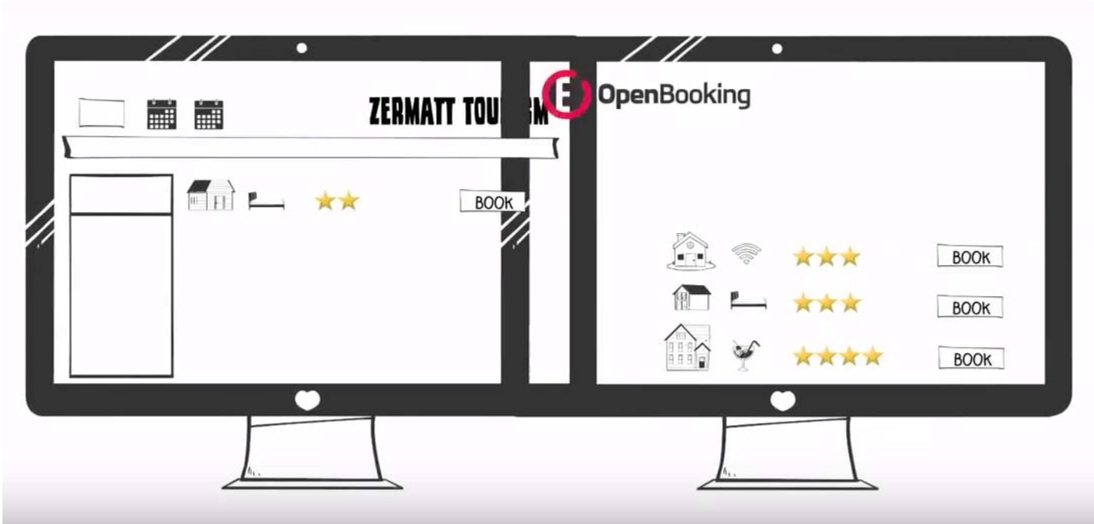


http://www.booking-valais.ch

- Created by **regional hotel association** and financed through **hotel taxes** and initial **money from regional government**.
- **Free system** for member hotels
- System includes also a **channel manager** (Seekda) for suppliers
- In 2016 the system generated nearly 30 million CHF of online booking revenue (20% direct)

Open-Booking Zermatt Tourism – the Destination Meta-search Platform

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

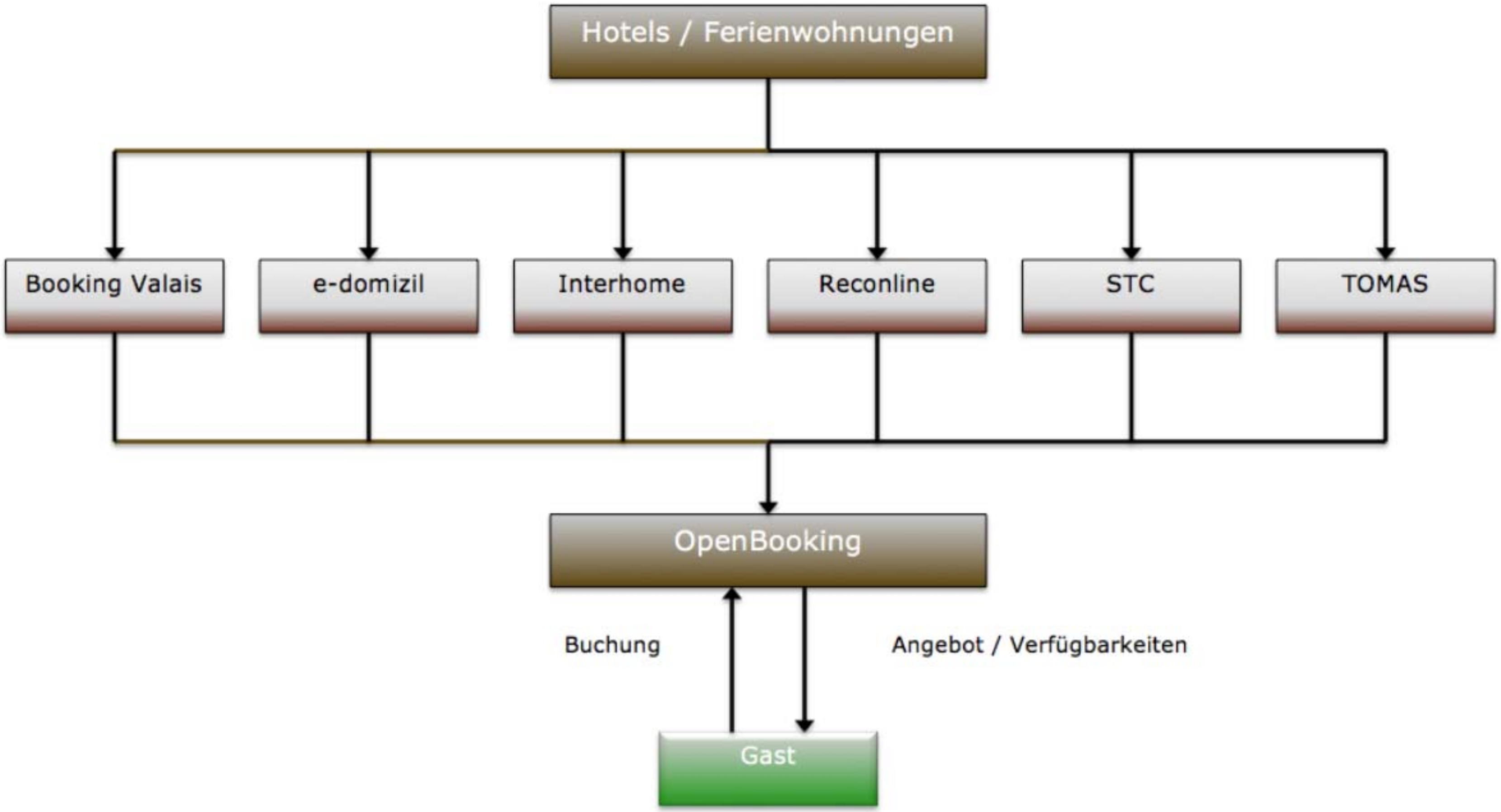


http://www.openbooking.ch/en/

- Open Booking is a **meta-search for Hotel and Apartment** availabilities in the Destination Zermatt-Matterhorn. The Destination Zermatt-Matterhorn has currently the providers TOMAS, Reconline, STC and e-domizil implemented. The customer will find on this booking-system the **greatest number of availabilities at the best price** and transparent shown on www.zermatt.ch.

https://www.ztnet.ch/openbooking

Open-Booking Zermatt Tourism: Integration of all local and regional Players



https://www.ztnet.ch/openbooking

Open-Booking Zermatt Tourism – the project

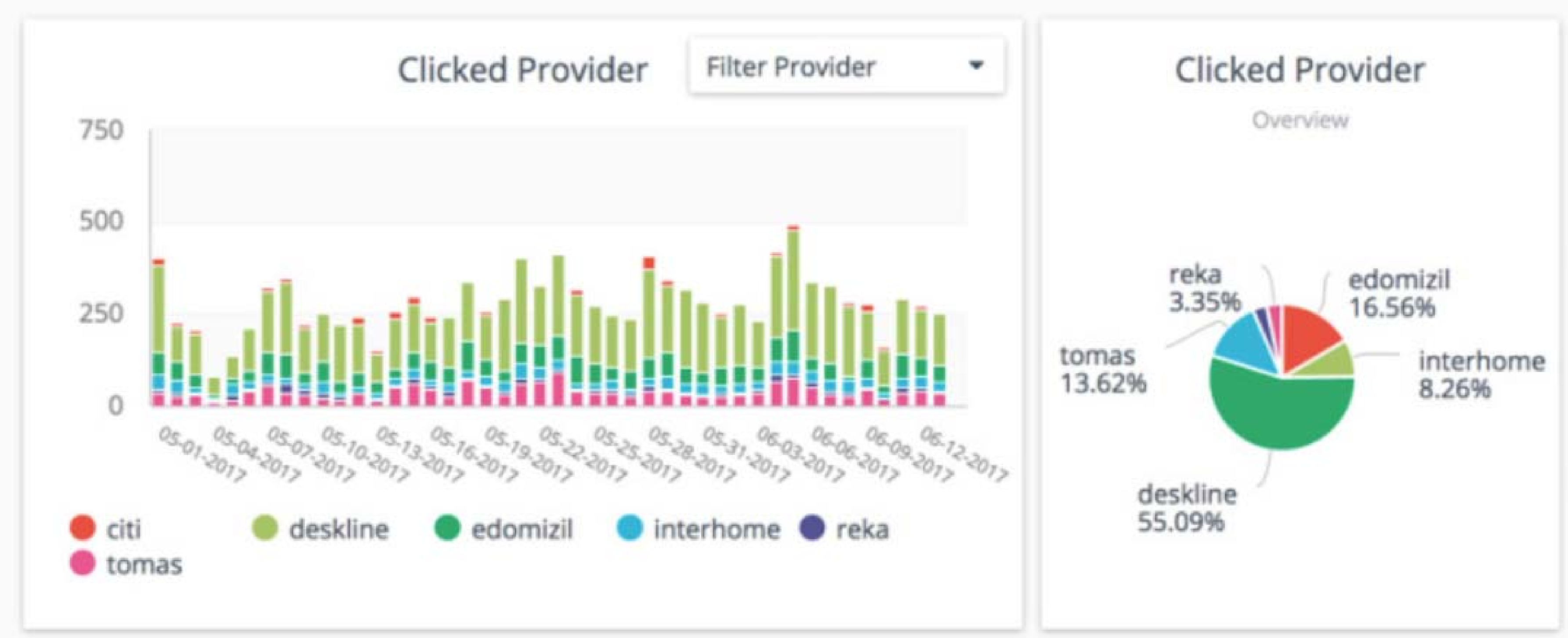
- Project between Zermatt Tourism and a private web agency from 2013
- Project financed **50% by national government** through the innovation support program **Innotour**. **50%** covered by the private partners.
- Today 13 tourism organisation in Switzerland with this approach (fully private initiative, no direct support from government)

Open-Booking Zermatt Tourism – value-added

Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

- The availability of **multiple online reservation systems increase the chances that customers book** on homepage of DMO. Which in turn affects an increase in overnight stays.
- The returned **customer data** from the system allows us to make **marketing-specific evaluations** and to improve services in DMO.
- In addition, Zermatt Tourism advise / supervise with these data his customers before and after their stay electronically (**Customer Relation Management**).

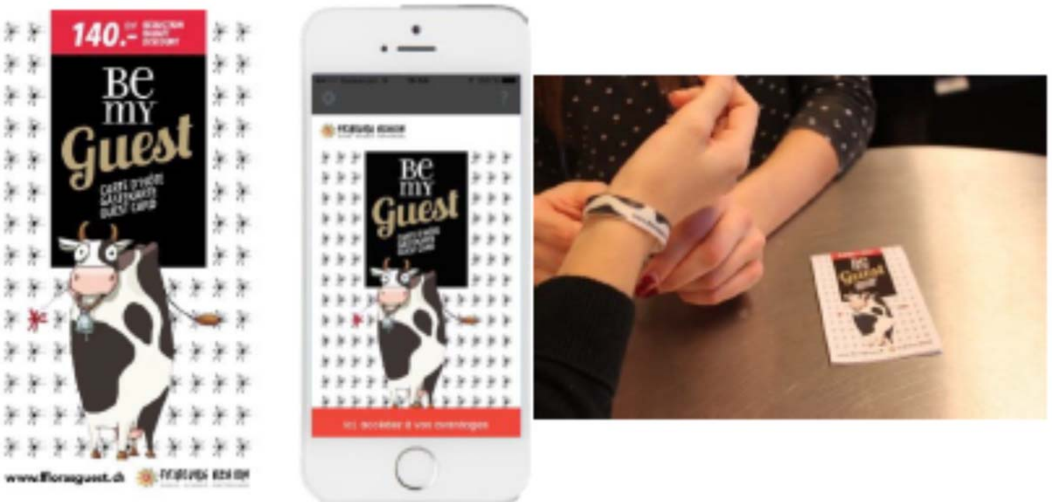
Open-Booking Zermatt Tourism: Real-Time Dashboards / Business Intelligence



Strategic visitor flow in Fribourg

Hes·so VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

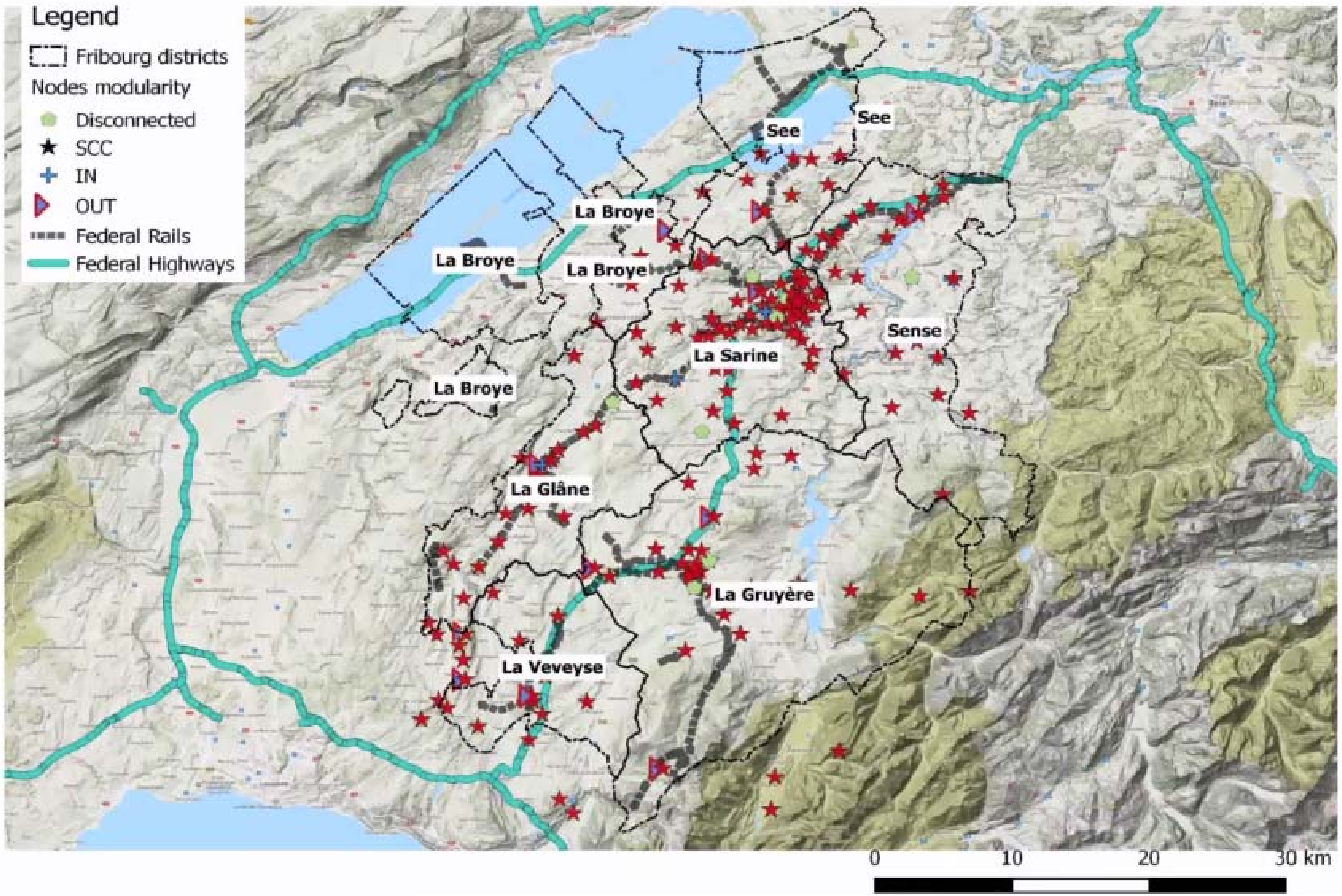
- Aim of project was to **analyze the movement of visitors** as recorded by **guest cards**' obtained from DMO offices ("be my guest" system) and by a **mobile phone data set**.
  - Prove the utility of mobile data in grasping generalized patterns of tourist movements in the canton of Fribourg, Switzerland.
  - Show how appropriate approach to Big Data environment helps solving problems based on network metrics.



Hosts get a free wristband from the first overnight stay in FRIBOURG REGION. With this unique sightseeing pass, they get discounts in most attractions of the region -> **info on socio-demographic profile, movement patterns**

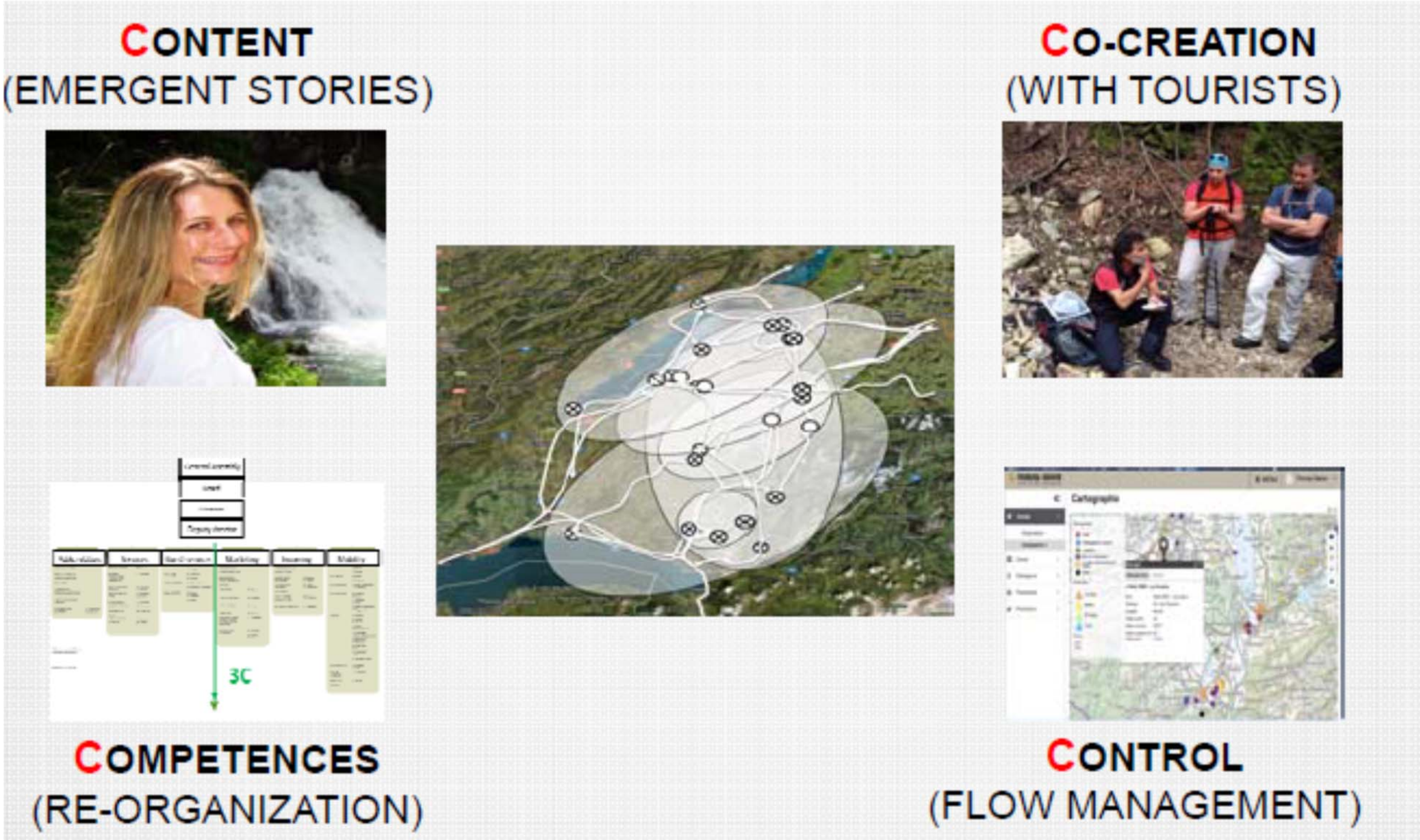
Strategic visitor flow in Fribourg

Hes·so // VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus



Baggio, R., & Scaglione, M. (2017). Strategic Visitor Flows (SVF) analysis using mobile data *Information and Communication Technologies in Tourism 2017-Proceedings of the International Conference in Rome, Italy,*

Smart Management of Strategic Visitor Flows



Baggio, R., & Scaglione, M. (2017). Strategic Visitor Flows (SVF) analysis using mobile data *Information and Communication Technologies in Tourism 2017- Proceedings of the International Conference in Rome, Italy,*

Smart projects for smart DMOs and suppliers

Hes·so // VALAIS WALLIS
Haute Ecole de Gestion & Tourisme
Hochschule für Wirtschaft & Tourismus

1) Public projects with private participation

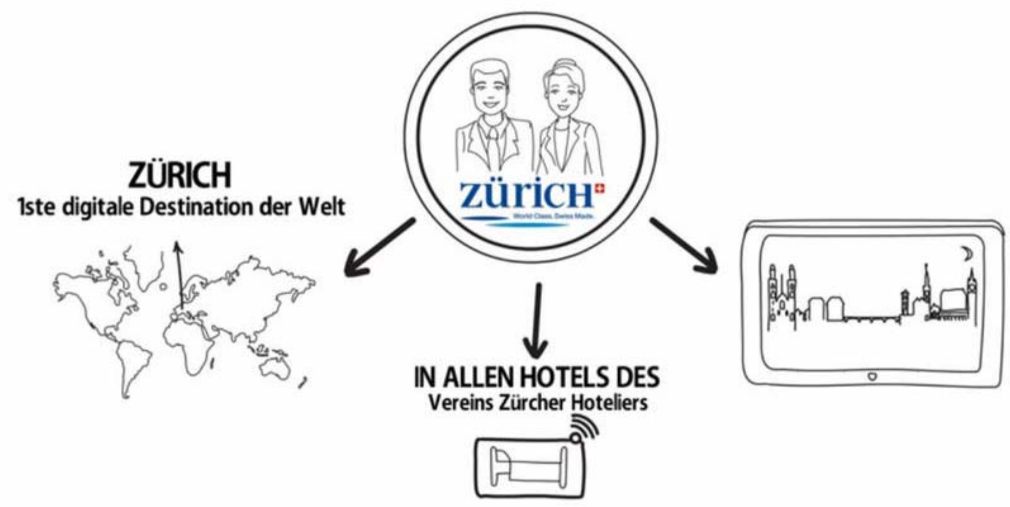
- Valais Tourism Observatory (from regional data to knowledge and business intelligence for the suppliers)

2)PPP projects (public-private partnerships)

- Digital Fitness (human capacity building in ICT and smart skills)
- Valais Booking (regional booking and channel management platform from the hotel association)
- Open Booking (local-regional meta-search solution)
- Strategic visitor flow in Fribourg (telecommunication data and guest card data)

3) DMO-Industry Partnership: Zurich Tourism as enabler for partners

Cooperation within the Industry: Zürich Tourism as Enabler for Hotels



Zurich Tourism has strived to expand the tourism bureau's role from marketing to what he calls **"enabling."** A big part of that consists of developing **new digital tools like the hotel tablets to enable hotels and other destination partners to become smarter, more digital savvy businesses**.

Another example, Zurich Tourism **provides an online platform that hotels can use to create their own search marketing campaigns**, which the bureau will track and then deliver data back to the hotels on metrics like audience reach and booking conversions.

Zuerich.com / www.skift.com (2015): Zurich Tourism CEO on the Future of Marketing Smart Cities

Agenda

- The (e)context of tourism
- Smart destinations – definitions and visions
- Management challenges of the smart destination concept (reality check)
- Approaches to overcome barriers towards smart destination (some modest projects from Switzerland)
- **Conclusions**

Theses: Smart Management

1. **Digital**: In a networked tourism world with digitally native and global digital players (e. g. OTAs), in the long term, only destinations that **transform themselves digitally** will be competitive and smart.
1. **Open / cooperative**: Smart destinations **use the collective intelligence and competencies of all stakeholders** (service-providers, population, guests, partners) for their portfolio of tasks via open and agile networks.

Theses: Smart Management

3. **New skills**: In a digital and smart (tourism) world, new skills and organisational forms are needed.

MERCI POUR VOTRE ATTENTION!

Prof. Roland Schegg

University of Applied Sciences of Western Switzerland Valais (HES-SO Valais)
School of Management & Tourism
Institute of Tourism (ITO)
TechnoPôle 3
CH-3960 Sierre/Siders, Switzerland
Tel: +41 (0)27 606 90 83
Mail: roland.schegg@hevs.ch
Twitter: @RolandSchegg
LinkedIn: ch.linkedin.com/in/rolandschegg/

Web:

University: www.hevs.ch / ***eTourism Switzerland***: www.etourism-monitor.ch / ***Observatory***: www.tourobs.ch

Bachelor of Science HES-SO in Tourism in German, French and English
http://tourism.hevs.ch

EMBA en innovation touristique: www.innovation-touristique.com