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TOURISM, CULTURAL HERITAGE AND E-SERVICES: USING FOCUS GROUPS TO ASSESS CONSUMER PREFERENCES

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This paper discusses the use of in-depth focus groups to assess residents, tourists and other stakeholders' preferences for e-services that would enhance access to cultural heritage in Amsterdam, Leipzig, and Genoa. Several e-services are mentioned, and in particular the integration of e-services in these cities is highlighted. The way this integration takes place very much relates to the maturity of each city in terms of cultural tourism, and information and communication technology (ICT). Our results show that the need for tailored information (profiling), interactive maps (geospatial dimension), booking service "one-stop shops", and consumer-generated content were all common in the three cities. In some cities the focus groups expressed a need for various forms of e-governance. Mobile devices and navigation systems were also high on the agenda in the more ICT-advanced cities.

Keywords: e-tourism, focus groups, e-services, consumer preferences

JEL Classification: *L83, M1, O1*

INTRODUCTION

Tourism is one of Europe's largest economic sectors and features among the largest key industries of the 21st century. Cultural tourism is

one of the forms of tourism expected to display significant growth in the future. However, major changes have taken place in the tourism industry, and this will greatly impact the way cultural tourism will develop in the coming decades. A shift from traditional to new ways of experiencing cultural resources is happening, employing a major diffusion of information and communication technologies (ICT) and new services (e-services) that modern information technologies bring. Therefore, there is a need to assess the preferences of potential tourists for innovative e-services that might enhance their experience before, during, and after a visit to the cultural destination of their choice. This assessment could provide policy-makers with important insights to help them appropriately shape the supply side of the tourism market in order to respond to the latent demand whilst developing sustainable cultural tourism strategies.

Sustainable cultural tourism strategies have the potential to assist the conservation of local identities embedded in their respective cultural heritage, while supporting economic growth. The economic impact that cultural tourism has on regional development is quite appealing to policy-makers, whose aim is to maximise the potential intake. European destinations aim at better developing their supply side in order to increase their economic competitiveness. The role that e-services can play in shaping the demand side has thus far not been fully explored. This paper aims to contribute and spur debate on this issue and it also discusses the results gathered from three different European cities: Focus groups were organised in Amsterdam, Leipzig, and Genoa targeting three different categories of respondents — residents, tourists and stakeholders (local decision-makers). This research illustrates the differences of opinion between respondents, and the implications that their preferences might have in shaping cultural tourism marketing strategies.

USING FOCUS GROUPS TO ASCERTAIN CONSUMER PREFERENCES

In the last 20 years, focus group interviews have been widely used as a form of qualitative research analysis. A focus group is defined as a group of people having a discussion on a fixed topic and expressing their attitudes and opinions in an interactive manner. Kreuger and Casey (2000) indicated that focus group interviews started in the late 1930s because a few social scientists had doubts about the accuracy of traditional information-gathering methods, and they started using and conducting focus group interviews. Stewart and Shamdasani (1990)

reported that focus groups were originally developed for the evaluation of audience responses to radio programmes in 1941 by the famous social scientist, Robert Merton. During World War II, Merton began to use focus group techniques to investigate morale in the U.S. Army. According to Kreuger and Casey (2000), whilst academic researchers were not very interested in using focus groups in the 1950s, market researchers started using focus groups as a research tool to identify the attractiveness of their products and related customers' preferences. Morgan (1996) stated that focus group interviews were rediscovered by social scientists in the 1980s, meanwhile adopting some of the practical strategies from market research experiences.

Presently, focus group interviewing is presented in many forms since researchers in different fields have modified the procedures to match their own needs and targets. Patton (2002) believed that focus group interviews were essential parts in an evaluation process, no matter if it was during a project, at the end of the project, or months after the project's completion, since the discussions help to gather insight. Morgan (1997) stated that focus groups could be used as a preliminary step in the design of surveys for further research, since they could help researchers get a better idea of individual issues to be tackled by questionnaires during the next stage. The purpose of a focus group is to listen and gather information on a well-defined research topic. Morgan (1990) noted that focus groups are a qualitative technique allowing us to use group interactions to produce data and insights in reasonable and accessible way.

Greenbaum (2000) defined focus groups as a qualitative market research technique in which a group of 8 to 10 participants with common demographics, attitudes, and/or purchase patterns are led through a typically 2-hour discussion on a particular topic by a well-trained moderator. McDonagh-Philp and Bruseberg (2001) stated that, compared to other qualitative techniques, focus groups provide unique sets of data: Researchers not only gain an overview of various opinions at a very detailed level, but also a great deal of concentrated, well-targeted, and pre-filtered data can be gained in a short period of time. Morgan (1997) argued that focus groups can be more efficient than interviews since they avoid overlap and repetition.

Cameron (2005) looked at the relationship between focus group interviews and quantitative research methods. He believed combining focus groups with quantitative techniques is an extremely useful way of dealing with certain research issues. In focus group brainstorming sessions researchers can generate new ideas, which are often used for

developing further research questionnaires. By using feedback from people in a focus group, researchers can get a better idea of question design and conceptual explanations to a targeted consumer group.

The focus group interviews presented in this paper served many purposes, aiming to develop a reference framework for the development of an e-services platform. They targeted the main potential users of an e-services platform represented by tourists, residents, and other stakeholders. With the target population, our focus groups first aimed at discussing which e-services are perceived as lacking and which existing e-services need better integration. Secondly, the focus groups aimed to stimulate discussion with different categories of potential e-users to promote creative and innovative ideas of how a possible platform should look, what features it should contain, and in general how it should work in order to be considered user-friendly. Finally, the focus group discussions were aimed at assessing people's preferences for integrated e-services, e.g. to what extent people would use these services, and which payment vehicle they would deem appropriate, if any.

E-SERVICES IN CULTURAL TOURISM

In recent years, the Internet has become one of the most powerful media and sources of information. Internet-based ICT includes the entire range of tools which facilitate the operational and strategic management of organisations by assisting them in storing and managing their information, as well as in communicating interactively with their stakeholders in order to achieve their mission and objectives (Buhalis, 2003). The use of ICT is especially relevant in tourism, where the provision of services to support travel for predominantly recreational and leisure purposes meets the objectives of storing, sharing and managing large quantities of information. It is the use of ICT in the tourism industry that constitutes the essence of "eTourism" (Aichholzer et al., 2003). According to Aichholzer et al. (2003), eTourism can also be perceived as one of e-government services since it somewhat deals with public information, and public sector agencies are involved as important actors. Generally, many tourism businesses are involved in developing their Internet services, including traditional travel agents, tour operators, national tourist offices, airlines, hotels and other accommodation providers, and car hire firms. The key differences from traditional markets are the speed at which information can be communicated, global

accessibility, and the minimal costs of establishing a business online (The Scottish Parliament, 2002).

In the tourism industry, e-services provide the most cost-effective manner of communicating with target markets and disseminating information, representing a quick and easy way for the customer to buy travel products, offer opportunities for improvements in customer service and retention through meeting and promoting individual preferences, reduce costs through increased efficiency in internal operations and purchasing processes, and encourage greater co-operation amongst traditional competitors through the provision of hyperlinks. However, some possible disadvantages were also identified in the literature: tension between a growing demand for personalized services tailored to the individual's needs and interests and reluctance amongst consumers to release such information over the Internet in case it is misused; the preference of many customers to conduct complicated transactions in a face-to-face environment (e.g. high-end travel agents); existing travel agent business being superseded, with resultant job losses; and finally, growing inequality and increased social exclusion for those customers and businesses without access to the necessary technology (Rayman-Bachus and Molina, 2001).

There are a number of projects worldwide focused on the assessment of current e-services in tourism as well as the development of new ones. A particular interest is being expressed in the creation of integrated platforms where a multi-level approach to providing services and sharing information can be implemented. Wireless devices, Location-Based Services and Really Simple Syndication (RSS) are a few examples of tourism-related e-services that are already available today. Although e-services have been widely used in the tourism industry, there are still some technological issues that need to be solved in order to make cultural heritage resources more readily accessible. The DigiCULT Report (2002) estimated that less than 10% of all cultural heritage institutions in Europe were actually in a position to participate in the digital era: At the root of this problem there are some technological issues, such as software availability. According to Michopoulou and Buhalis (2006), there are also other segments of users who face difficulties accessing the Web due to design shortcomings, such as speed of their Internet connection, and graphics issues. Graphics support remains a problem for the users who rely upon the essential "visual" aspect of e-services, like tourists, for example. There are also some additional issues, e.g. users' requirements, supply of information, language, equal treatment, and reliability.

The report "Future trends for eTourism services", prepared under the EU-funded "Providing Innovative Service Models and Assessment" (PRISMA) project, identified a number of key trends and future attributes of tourism services: increased popularity and capabilities of the Internet; the Internet and supporting services by further new intermediaries; direct online bookings by customers; "Virtual tourists"; interactive TV and mobile devices; various types of smart agent technologies, VoIP technology; and mobile city guides (eTourism Services, 2003).

IDENTIFYING NEW E-SERVICES IN THREE EUROPEAN CITIES

In our research, focus groups aimed to identify possible cultural-heritage related e-services for further development. In order to do so, it was crucial to understand what type of information users prefer, and how this should be presented to them (e.g. which type of media and devices). Developing focus group agendas for specific research is a dynamic process. The agendas were modified and improved from the experience and knowledge acquired during the first focus group attempts. Therefore, it is important to clarify the rationale behind the focus groups' development, and the major objectives to be achieved in order to develop an appropriate framework that can be easily adapted in due course. The questioning route per each focus group would then follow good practices whilst aiming to tackle the identified objectives and account for major results from previous focus groups.

The main objective of the first focus group agenda was to review and compare the basic attitudes towards e-services across different participant categories, aimed at understanding how different groups of participants perceived the potential of ICT services, and how they used these services to manage, understand, and explore European cities. The basic aim of the second phase of the focus group agendas was to understand how different groups of participants perceived the potential of e-services and how they can better understand, manage, and enjoy tourist destinations, further engaging with cultural heritage with the help of different e-services. The basic premise of the third phase of the focus group agenda was to understand how different groups of participants perceived the potential of ICT services to better enjoy, appreciate, and manage the cultural heritage of European cities. The additional aim was to learn how e-services should be provided using rich media and also to gather ideas about possible payment vehicles for such e-services and their combinations.

FOCUS GROUP IMPLEMENTATION IN THE THREE CITIES

Overall, 24 focus group meetings with 159 people were held between December 2006 and January 2007 in Amsterdam, Leipzig, and Genoa. The participants were tourists visiting these cities, local residents, and other stakeholders who had a political say in the way cultural tourism offers were organised locally. Local residents were perceived both as potential tourists to other destinations as well as citizens and residents of the city. Local residents were those who can cultivate their own cultural heritage (and publicise it on the Web, for instance). Local residents can identify a list of e-services that they would like to have in order to achieve a better quality of life and access their cultural heritage.

Stakeholders were mainly identified as decision-makers working in areas related to cultural tourism and cultural heritage. Their interest in cultural heritage and tourism can be split into two broad groups: managers and people involved in branding the city (e-services help them make decisions), and decision-makers who want to publicise their stake (better integrate the hospitality sector — hotels, restaurants).

Tourists were people visiting the city or preparing to visit as well as those who are returning to the city. The tourists' aim is to enjoy the city and their visit; their secondary aim is to understand and explore cultural heritage, both tangible and intangible. For the purposes of this research, tourists were defined as people who have come from another city and whose main aim of visiting the city is tourism (a non-business or work-related trip) and who spend at least one night in the city. We hoped the focus groups would mirror the demographics of the respective city.

The response rate in the focus groups was satisfactory and on average met the recommended standards. In Amsterdam, 13 tourists, 23 residents, and 21 stakeholders took part in the meetings. In Genoa, we had 11 tourists, 17 residents, and 19 stakeholders. Whilst in Leipzig, 13 tourists, 16 residents, and 26 stakeholders attended the meetings. The role of the local municipalities was crucial for our successful implementation of the focus groups. Recruiters liaised with their respective municipality in order to gather relevant demographical statistics for the city, e.g. general statistics of the local resident population, information and statistics on tourists' flows, e.g. the numbers of tourists, average number of nights spent by tourists in the city, etc.

NEW E-SERVICES FOR CULTURAL TOURISM

The importance of the geographical dimension for e-services, the need for tailored information, and hence a new taxonomy to enhance digital access to cultural heritage services seemed very important to the participant consumers.

In Amsterdam, respondents suggested more original e-services and speculated about possible combinations of e-services displaying more visionary ideas. It seemed that the supply of e-services in Amsterdam was sufficient, since most of the e-services that tourists and residents indicated as desirable already existed in some form. The major concern in Amsterdam was to simplify access to information for all groups of users: Information overload was mentioned quite often. Therefore, it seemed that the main concern was to integrate the existing services, and helping more disadvantaged people, such as the handicapped and elderly. Overall, the situation in Amsterdam proved to be more advanced in terms of e-services and its relation to cultural heritage. The attendees in Amsterdam were more familiar with relatively advanced technologies. Many participants also appeared to recognise the importance of investing in new e-services in order to improve their functionality and were prepared to pay for having access to dedicated websites, wireless, and satellite applications.

In Leipzig, participants considered the supply of e-services to be sufficient. Leipzig is not a mature tourism destination (often overshadowed by Berlin and Dresden), therefore needs and perspectives differed on this matter. Most focus groups concluded that there was enough information relative to Leipzig's modest tourist share available online. The major issue was that the existing information needed to be organised in a better way. The issue of the city's promotion as a cultural tourism destination was often raised, but most participants felt that it would be more effective to use traditional (or old-fashioned) media (e.g. TV spots, newspaper adverts, brochures). We can postulate that in a less mature tourism destination e-services co-exist with traditional media. The attendees of the Leipzig focus groups seemed to not be very familiar with more advanced mobile devices since they still tended to use conventional media, and believed that the Internet should be closely related to conventional media.

Table 1 Principal e-services in the three cities

E-services	Amsterdam			Leipzig			Genoa		
	R	S	T	R	S	T	R	S	T
Interactive maps	I,II, III	I,II, III	I,II	I	III	I,II	I,II I	II, III	I, II
Thematic search	I, III	I, III	I	I,II, III	I	I,II		I	
Profiling	I,II, III	I,II, III	I	II	I,II	I	I,II I	I,II	
Booking system ("one-stop shop")	II, III	I, III	I	III	I,II ,III	I,II	I,II ,III	I,II ,III	I,II
Journey planner	I,II, III	III	I,II		III	I	III	I,II ,III	II
Wi-Fi system	II		I,II	III					
Event Calendar	I,II, III	I		I,II ,III	I,II	I,II	I,II ,III	II	I,II
Podcasts/ downloads	III	I	I,II		II	II	III		
Webcam system	II	I	I		II		I		I
Guided tours	III			II	I,II			I,II	
Kiosks	II, III	II	I,II	II,I II	I,II I	II	I,II I	I	
Informative desks			I		III		III		
Children-oriented website	III								
Online practical information (transport timetables, etc)	I, III	I, III	I,II	I,II I	III	I,II	I,II	I,II	I,II
Online information on highlights (videos, pictures)		I		I,II	I		I,II	I,II	
e-Forum	I,II, III	I, III		II,I II	II,I II	I	I,II ,III	I,II ,III	I,II
Blogs	I, III	I, III		III	III		III	III	I
Advertising on events	III	II,			I,II	I	III	II,I	I,II

(promotional e-services)		III			,III			II	
SMS alert with highlights		I, III			I,II ,III			II	
Virtual tours	I,II , III	I,II		I	II,I II		I,II	I,II ,III	I
Radio broadcasting	II								
Integrated system"Home" (alerting with tailored information)	I								
Video reconstructions of city		II, III			I,II I	I	II	III	
City Wikipedia		III	I						
Video screens in public transports/ spaces	II	II		II	I,II	I			
One tourist/resident portal	I,II	I	I,II	II,I II	III	I	I		
GPS system	I,II ,III	I, III	II		III	I	III	I,II ,III	II
PDA systems (info delivery)	I,II , III	I,II , III	II				II,I II	II	
TV broadcasting				II	I,II I	I,II	II	III	
"Second-life"-type games	I,II , III	II, III			III			III	
Tourist satisfaction questionnaires									II
Online city offices/ e-governance systems				I,II ,III					
Satisfaction charts							I		

Note: I, II, and III indicate the 1st, 2nd and 3rd phases of focus groups in all three cities.
Source: Authors' own results

Therefore, the Leipzig participants would like possibilities in combining e-services and traditional services. The majority of Leipzig participants talked about up-to-date Internet websites with additional

integrated services, e.g. online information about events and tourist highlights, online booking services and e-governance. In addition, all participants of focus groups in Leipzig indicated that websites with integrated e-services were the most important and convenient way to convey information on cultural heritage.

In Genoa, the situation regarding the availability of e-services seemed to be very poor and linked to the low levels of Internet connectivity and IT proficiency in the country, and within the region. Although Italy boasts of one of the highest sales of the newest mobile phone models, very few people imagined using e-services in different areas of their life and work. For most of the attendees, "e-services" meant an Internet website. Numerous attempts to push their imagination further, beyond the website, quite often led to awkward silence in the groups. Even the stakeholders could not think of many interesting examples of e-services that could be used in their work (with the exception of a website). It seemed that in Genoa e-services are something new and undiscovered.

The participants of focus groups in Genoa were clearly in need of a simple and efficient way of obtaining on-line tourism-related and city-related information. This could be done using a personalised website or an integrated website, hence a "one-stop shop" that would include all applications. There was also a clear need for being able to share information with others, receive updates and tips from other users as well as to be able to engage in cultural and public life (e-participation system). These issues were also mentioned in Leipzig. The Genoa participants seemed to not be able to imagine how e-services could be used for the promotion of cultural tourism. The most frequently mentioned e-services and their combinations included a "one-stop shop", personalised websites and itineraries, e-forums and blogs, totems (panels on websites for tourists and residents that could offer information and help itinerary choices) as well as interactive maps tailored for specific users.

One of the research questions was to see whether people would be willing to pay for the provision of e-services. It appeared that people were not willing to pay for services that are already available in some form. They were only willing to pay for new e-services, like e-services that show a higher degree of integration. This highlights the need to propose scenarios interpreting people's needs and improving current e-services offers since participants tended to have a lower willingness to pay (WTP) for goods with which they were unfamiliar.

Finally, focus group implementation highlighted important differences in the local cultural context that might cause problems in the

development of a conjoint choice questionnaire. Measures should be undertaken to avoid a loss of important information.

COMPARING FOCUS GROUP RESULTS FROM THE THREE CITIES

This section compares the statistics of respondents from all three cities (residents, tourists, and stakeholders alike). A comparison of the residents' statistics (Table 2) shows that: (1) While more than half of the participants in Amsterdam and Leipzig were males, the situation was reversed in Genoa. (2) The average age of residents was the highest in Leipzig, followed by Genoa. (3) The share of university-educated residents was the highest in Genoa, followed by Leipzig. (4) The majority of Amsterdam residents were single, which was followed by Genoa. The largest share of married residents was found in Genoa. There was a high share of unmarried people in Leipzig due to the local particulars of people living in civil partnerships (i.e. living in a family, sharing a house, and having children, without being married).

Table 2 Comparing residents in three cities

Variable		Amsterdam	Genoa	Leipzig
GENDER	Males	52.17%	47.05%	68.75%
	Females	47.83%	52.95%	31.25%
AGE	Mean age	35.05	36.36	39.5
	Median age	31	34	39.5
EDUCATION	Compulsory level or less	0%	5.88%	31.25%
	High school	30.44%	11.76%	6.25%
	University	69.56%	82.35%	72.5%
CIVIL STATUS	Single	82.6%	70.58%	31.03%
	Married	13.06%	29.42%	13.79%
	Other (divorced/separated/widowed)	4.34%	0%	55.12%

Source: Authors' own results

Most of the focus group residents with some IT expertise lived in Genoa, second came Amsterdam, and Leipzig third. One possible

explanation could be that the general percentage of residents with some IT expertise was so low in the three cities that fewer focus group residents might influence the distribution in favour of Genoa. The highest share of residents frequently using the Internet was found in Amsterdam (followed by Genoa). Most of the residents with cultural heritage expertise also originated from Amsterdam. Amsterdam's focus group results showed that local residents knew a lot about their city and were willing to learn and share information about its past, present and future.

Concerning the WTP for e-services and its combinations, the distribution of residents who were willing to pay was similar to those of the share of residents who used the Internet regularly. This might be explained by the fact that Amsterdam residents tended to be more advanced in their knowledge and practical use of tourism-related e-services, which helped them understand that new e-services, especially those using the most current technologies, cannot be provided for free. On the contrary, the lack of advanced e-services in technologies and the poor level of Internet connectivity in Leipzig resulted in local inhabitants being totally unaware of the opportunities that new and integrated e-services can bring.

Table 3 Comparing stakeholders in the three cities

Variable		Amsterdam	Genoa	Leipzig
GENDER	Males	61.9%	21.05%	61.53%
	Females	38.1%	79.95%	38.47%
AGE	Mean age	37.77	38.5	n./a
	Median age	35	39	n/a
EDUCATION	Compulsory level or less	0%	5.26%	n/a
	High school	9.52%	15.8%	n/a
	University	90.48%	78.94	n/a
CIVIL STATUS	Single	14.28%	36.84%	n/a
	Married	71.42%	52.63%	n/a
	Other (divorced/separated/widowed)	14.28%	10.52%	n/a

Source: *Authors' own results*

Although, due to sensitivity and privacy reasons, some statistics on Leipzig stakeholders were not available, a comparison still can be made

(Table 3): (1) Whilst more than half of stakeholder participants in Amsterdam and Leipzig were males, the situation was reversed in Genoa. This can be explained by the popularity of public office jobs in Italy amongst females: these jobs do not earn much but provide security and stability. (2) The average age of stakeholders was higher in Genoa than in Amsterdam (data unavailable for Leipzig). (3) The number of university-educated stakeholders was larger in Amsterdam than in Genoa. (4) The majority of stakeholders in Amsterdam were married.

Concerning expertise in cultural heritage, Leipzig stakeholders seemed to be in the lead. This might be explained by the high motivation and level of knowledge within the city and its historical sites. In addition, all stakeholders who came to the focus group sessions in Leipzig had very high expectations about the outcome of the focus groups as well as about the whole project. This, therefore, positively biased their sample. The majority of the stakeholders who would be willing to pay for e-services came from Amsterdam (Leipzig data unavailable).

Table 4 Comparing tourists in the three cities

Variable		Amsterdam	Genoa	Leipzig
GENDER	Males	69.23%	36.36%	15.38%
	Females	30.77%	63.64%	84.62%
AGE	Mean age	31.33	34.88	26.53
	Median age	31	31	25
EDUCATION	Compulsory level or less	0%	9.09%	0%
	High school	30.77%	27.27%	0%
	University	69.23%	63.64%	100%
CIVIL STATUS	Single	61.53%	100%	100%
	Married	23.07%	0%	0%
	Other (divorced/separated/widowed)	16.4%	0%	0%

Source: Authors' own results

When the general statistics of tourists in the three cities were analysed (Table 4), some characteristics become apparent: (1) More than half of

participants in Amsterdam were male, however more than half of participants in Genoa and Leipzig were females. (2) The average age of tourists was the highest in Genoa and the lowest in Leipzig. (3) The majority of university-educated tourists were from Leipzig, followed by Amsterdam. There was a high share of tourists with a high school diploma from the Amsterdam and Genoa focus groups. (4) All Leipzig and Genoa tourists were single.

The results of the tourists' expertise demonstrated some interesting results. The majority of participants to the tourists' focus group who had some IT expertise were recruited in Amsterdam. In general, tourists in all three cities tended to be good Internet users. Concerning expertise in cultural heritage, only tourists visiting Amsterdam and Genoa had some level of expertise. Tourists visiting Amsterdam were prepared to pay for e-services and their combinations, explained by the fact that the city is very technologically advanced and already offers a large variety of e-services to its potential visitors.

When we compare all three cities, one can see that the level of knowledge of e-services in these European cities depended on the general ICT situation in the country. With the overwhelming overall preference for integrated e-services (a "one-stop shop") in all three cities, some major differences can be traced: The situation in Amsterdam proved to be more advanced in terms of e-services and its relation to cultural heritage. The attendees of focus groups in Amsterdam used more advanced technologies; a large number of participants showed that their great interest for e-services was linked to digital mobile devices. Participants of focus groups in Amsterdam also appeared to be the only ones who recognised the importance of investing in new e-services in order to improve its functionality.

The situation in Genoa was very different from Amsterdam: Focus group participants were clearly in need of a simple and efficient way of obtaining on-line tourism-related and city-related information. According to the Genoa participants, this could be accomplished using a tailored personalised website or a "one-stop shop" website integrating all applications. There was also a clear need for information sharing, receiving updates and tips from other users as well as being able to engage in cultural public life (e-participation system).

Despite the wide use of mobile phones and other digital devices in Italy in general and in Genoa in particular, the participants of the Genoa focus groups seemed not to be able to imagine how those tools could be used in conjunction with e-services for the promotion of cultural tourism.

Similar to the situation in Genoa, the attendees of Leipzig focus groups seemed to have little knowledge about advanced digital mobile devices. They still tended to use conventional media, and participants believed that the Internet is closely related to conventional media like TV, radio, newspapers and other print media. Therefore, they would like possibilities for combining e-services and traditional services. The majority of the participants in Leipzig focus groups talked about up-to-date Internet websites with additional integrated services (e.g. online information about events and tourist highlights, online booking services, and e-governance). In addition, all participants to Leipzig focus groups indicated that an Internet website with integrated e-services was the most important and convenient way to spread information on cultural heritage.

CONCLUSIONS

This paper presented the results from 24 focus groups held in three European cities. Our key findings can be summarised as follows: Generally, participants correctly recognised what e-services were, though sometimes they encountered difficulties in linking e-services to cultural tourism. There was a difference between the perception and understanding of e-services in the cultural tourism sector between the three cities due to the different levels of ICT proficiency and probably the level of maturity as tourist destinations. Amsterdam resulted as more advanced in the use of both mobile and Internet-based services, with Leipzig and Genoa lagging behind. On average, the proposed e-services corresponded to past or currently available services, and except in a few cases, respondents found it hard to come up with really innovative perspectives. Most of the mentioned e-services were Internet-related, although some participants were also very interested in mobile devices.

In all three cities, tourists declared a need for practical information. Residents liked to know more about the history of their city and have virtual tours with historic reconstructions. Both residents and tourists were concerned about the reliability of tourist information. They wanted the local authority (municipality) to take over the role of delivering the appropriate, up-to-date information per each e-service. Consumer-generated content was also high on their agenda.

The respondents declared a need for integrating e-services provided on the Internet with information access kiosks, giving people the possibility to access cultural tourism information not only from their home computers. Tourists and residents pointed out that they wanted to leave

messages and recommendations based on their special needs, to get information and to interact in forum discussions. Also, they told us they liked services that made it easier to get in touch with the authorities. On the other hand, stakeholders discussed opportunities for analysing user behaviour, requirements and expectations, in order to personalise their offers according to special needs. This indicates that e-forums should be one of the key attributes of further research.

Providing "one-stop shop" services seemed to be of great importance. This was applicable to some specific e-services, and especially booking services. The need for integrated e-services differed in the three cities and some e-services were only mentioned once. Focus group results converged on a limited set of e-services and their characteristics that were regarded important by most of the respondent categories in each city. With regards to prices for e-services, focus group results suggested different modes of payment: per download, weekly, or a yearly subscription with unlimited access.

Another important implication was that stakeholders replied to focus group questions from the supply-side perspective. As suppliers, they mostly mentioned the same e-services as residents and tourists. Therefore, we suggest using one of the available scenarios (possibly tourists) in order to analyse the supply side of the cultural tourism e-services market. Stakeholders might be asked to choose packages of integrated e-services to supply to tourists at a determined price. This would enable researchers to compare e-services from the supply and demand side. In fact, we would be able to elicit the willingness to pay of tourists for a selected combination of e-services, comparing it with the price stated by the supplier.

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ENDNOTES

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