



ROUTE 2.0
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Extremadura: Regional Needs Analysis

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EXECUTIVE SUMMARY

This document contains the summary and main conclusions related to the regional analysis on the use of Social Media in the tourism sector in Extremadura. The analysis has been conducted between December 2011 and March 2012 to identify the status quo on the use of Social Media in the tourism sector, the barriers to use those media and the needs of the institutions to strengthen their Social Media use in their daily business life.



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1 ICT AND SOCIAL MEDIA USAGE IN SPAIN

The usage analysis of ICT and social networks in Spain is essential because it will determine whether the activities carried out under the project to be effective or don't meet the reality of the environment.

After a preliminary stage dominated by the growth of Internet as an information and booking of travel services, transport, accommodation and other, comes a new phase 2.0 in which the model incorporates the role of the user.

Spain ranks third in world ranking of using social networks the Internet users, keeping in line with other states such as Italy, UK or France, and exceeding the figure of 75% ¹. The growth of social network users has been dramatic (25% in the last two years) but beginning to appreciate some stabilization. The reach of social networks in Spain in 2010 is around the European average (84.6% vs. 84.4%) ².

Reach and Usage by Country / Apr 2010 (Home & Work)		
Social Networking / Blog Sites		
Country	% Reach of Active Users	Time per Person (hh:mm:ss)
Brazil	86%	5:03:37
Italy	78%	6:28:41
Spain	77%	5:11:44
Japan	75%	2:50:50
United States	74%	6:35:02
United Kingdom	74%	5:52:38
France	73%	4:10:27
Australia	72%	7:19:13
Germany	63%	4:13:05
Switzerland	59%	3:43:58

Source: The Nielsen Company

As in the other four large European countries, social network preferred by Spanish public is Facebook. Below lies the Spanish social network Tuenti, strongly associated with younger audiences. Meanwhile, Twitter gets high growth rates in third place. Social networking professional profile as LinkedIn shows a reduced incisiveness.

¹ Blogs Now Account for One in Every Four and a Half Minutes Online. Nielsen, 2010.

<http://blog.nielsen.com/nielsenwire/global/social-media-accounts-for-22-percent-of-time-online/>

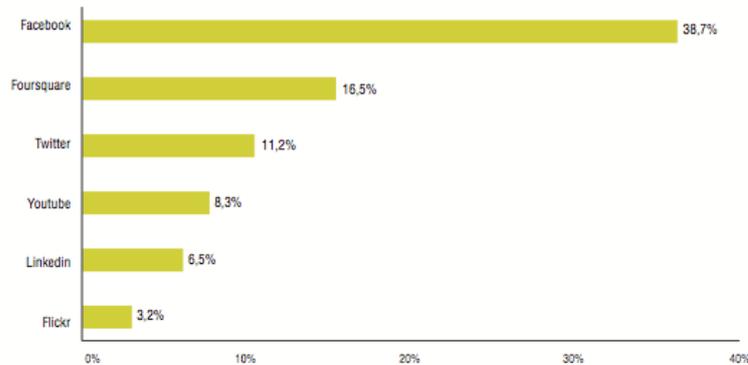
² Las redes sociales en Internet. Observatorio Nacional de las Telecomunicaciones y de la Sociedad de la Información. Diciembre 2011.

http://www.osimga.org/export/sites/osimga/gl/documentos/d/20111201_ontsi_redes_sociais.pdf



Response to the user's social networks profile in Spain is practically homogeneous: slightly higher in women than in men, and reaching equally to all ages between 18 and 55 years³.

0: Porcentaje de pymes en España que usan cada una de las redes sociales



Fuente: Observatorio sobre el uso de las redes sociales en las pymes españolas. Fundación Banesto, 10/2011

The Spanish Internet users use an average of three different social networks and Facebook is always one of the three alternatives (the best known, used, valued and preferred). The linkage of Spanish users with social networking has been increasing gradually so that the frequency of daily use reached 73% of users in 2011, while 17% do so several times a week. It also stresses usage of social media through mobile devices (smartphones and tablets) showing significant growth.

The reasons given for the choice and use of social networks are communicating with family/friends (notably Facebook), cheap or free communication, monitoring of issues related to culture and leisure (an important factor in Twitter), and audiovisual contents (especially YouTube). Regarding consumption, the Internet users assert that communication through social networks and supported by feedback from friends, family, independent experts, ..., gives them more credibility than traditional advertising⁴.

There are also declining social networks such as Hi5, Badoo and especially MySpace, which are moving backwards significantly. Inactive Internet users are not present in social networks primarily because of their absence of interest, protection of privacy and lack of time.

In Extremadura, the number of social network Internet users stands at 80% (in 2010), slightly below the national average, while it's true that there has been a sharp increase from 64% in 2009⁵. The use of Tuenti in the region is a differential factor to consider, far above the rest of Spain.

³ III Estudio sobre Redes Sociales en Internet. Interactive Advertising Bureau Spain / Elogia Marketing Singular. Noviembre 2011. http://www.slideshare.net/IAB_Spain/iii-estudio-sobre-redes-sociales-en-internet?ref=

⁴ Informe de resultados Observatorio de Redes Sociales. 3ª oleada, 2011. The Cocktail Analysis. Febrero 2011. <http://www.slideshare.net/TCAAnalysis/tca-observatorio-redes-sociales2011publico>

⁵ Las Redes Sociales en Internet. Observatorio Nacional de las Telecomunicaciones y de la Sociedad de la Información. Diciembre 2011. http://www.osimga.org/export/sites/osimga/gl/documentos/d/20111201_ontsi_redes_sociais.pdf



Spanish users aren't a outstanding contents' creators. Usually they seem to be less active in social technologies and are therefore considered primarily spectators⁶. However, over time, this behavior is becoming more participatory.

As regards companies with the largest presence in social networks, Socialbakers⁷ point out Mercadona, Loewe and Roberto Verino as more active with their users, Cash Converters, Avanzbus.com and Ginos as the best use to communicate with their users and fashion brands such as Stradivarius, Blanco and Desigual on the number of fans on Facebook.

All this information shows the importance that social networks have gained in Spain in recent years. This gives rise an important market to companies willing to exploit this opportunity.

2 STATUS ON THE USE OF ICT AND SOCIAL MEDIA IN THE TOURISM SECTOR

2.1. Current use and knowledge of Social Networks in the Spanish Tourism Sector

According to the ePyme 2011 report⁸ the hotel industry reached very high levels of ICT and equipment and use:

- 98.7% of companies have Internet access.
- 96.1% of the hotels maintain corporate website.
- 88.1% of companies engage with their customers through this social media.

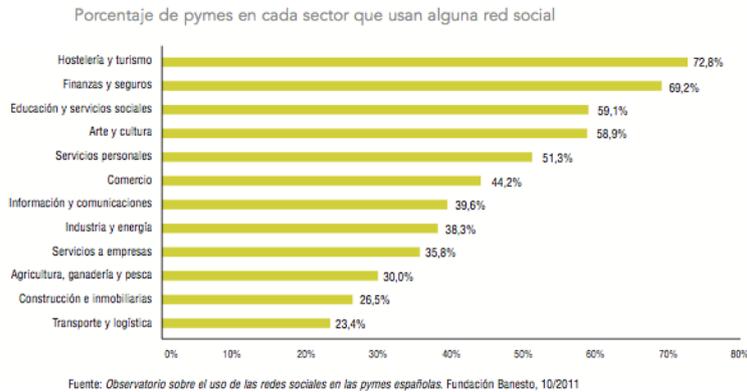
The main reasons that SMEs have to use ICT are to provide a quick response to market demand, geographic market expansion, cost reduction, improved company image and business process acceleration.

Despite this presence, there is a low refresh rate in most profiles. Only 12% of companies interact with their partners through social networks.

⁶ European Social Technographics Revealed. How Europeans are adopting social technologies. February 2008. <http://www.samsa.fr/wp-content/uploads/2008/08/social-technology-report.pdf>

⁷ Socialbakers Social Media Report of Facebook pages in Spain. November 2012. <http://4.bp.blogspot.com/-2FgspMQ09TM/Ts6CBLbruWI/AAAAAAAAAR0w/HBCQ4ujvxRA/s1600/es-nov2011.png>

⁸ Informe ePyme 2011. Análisis Sectorial de implantación de las TIC en la PYME española. MITYC & Fundetec, 2012. http://ithotelero.com/sites/default/files/image/Proyectos/Innovaci%C3%B3n/Informe%20e-pyme%202009-2010/informe_epyme_2011.pdf

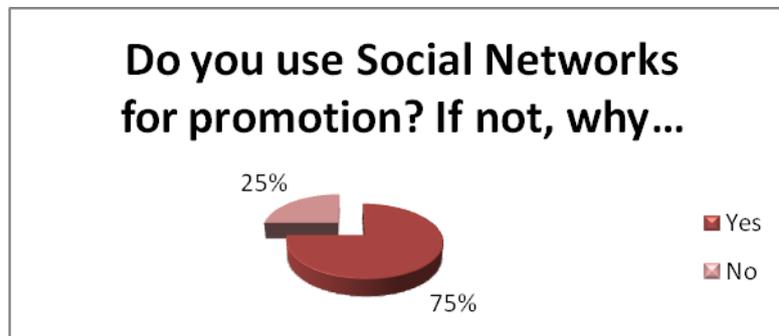


This data shows that Spanish tourism companies, especially hotels, are not only more active SMEs in social media but also are those who have reached the most advanced stage implementation of electronic commerce, where the Internet becomes as an ally for tourism marketing and distribution. However, there are many areas for improvement in the use of these tools to be truly effective in their purposes.

2.2. Current use and knowledge of Social Networks in the participant organisations

Route 2.0 has carried out a field work to analyze the different needs that SMEs in Extremadura have regard to implementing the use of social networking as a tool for their communication and marketing activities. To do this, there have been a total of 20 surveys to different companies according to pre-marked criteria. Similarly, interviews were conducted in certain cases. The analysis phase was completed with the conclusion of an experts panel that were collected several conclusions with which the partners can work. It has also made a detailed study of the various sources of documentation on this topic.

Four of the respondents don't use social media because they don't have time for it or because they don't think this is necessary for their marketing activities. This survey shows that restaurants are the least likely to use Social networks.

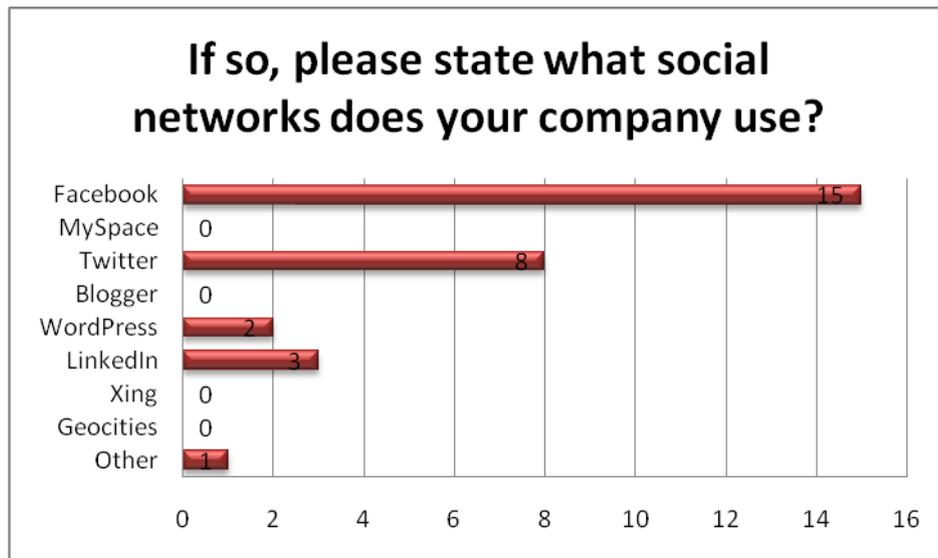


Regarding to Social networks used by respondents, it is remarkable the prevalence of Facebook, followed by Twitter. The other options are very minor or without any presence.



Most respondents believe that Facebook is the Social network that best meets their communication needs, but Twitter and LinkedIn also deserves good opinion by their users. In contrast, blogs are considered a lost time due to lack of visibility.

Mostly participating companies have not specific responsible for marketing but this task is usually performed by the owner of manager. It is therefore reasonable that none of the respondents is community manager.



Most of the surveyed companies (65%) didn't feel needed training in Social networks. After collecting data through surveys and interviews, we carried out a panel of experts to assess the different data. This analysis drew numerous conclusions and recommendations to guide the training in this subject.

2.3. Benefits to use Social networks

Some advantages observed following the various surveys of SMEs in Extremadura are:

- Social networks generate emotional ties between brands and consumers. This is also an opportunity for customer loyalty.
- Social networks achieve a leadership position against traditional Web pages because they allow the communicate interaction between companies and users.
- Social networks provide a means of easily access for SMEs. It have been established as a mass media of immense size than also it can generate an exponential communication thanks to the viral effect is produced.
- Social networks are easily accessible to SMEs, which have at their disposal a powerful media that also generate viral effect in their messages.
- Use of Social networking as a marketing channel is a remarkable opportunity to face the difficulty of funding for other media in the current economic climate.
- Saturation of advertising information adds value to information supplied from close contacts (family/friends) through Social networking. Moreover, this adds the possibility of comparing information through specialized virtual communities.



2.4. Barriers to use Social networks

- Social networks are focused on people rather than products or services. This involves the use of different techniques to those usually provided in traditional marketing.
- Companies have reticences regarding the positioning of the company's image so that it can be related to inappropriate content or problems concerning the personal data protection.
- Companies don't believe there is a lack of technological training regarding the use of Web 2.0 tools. However, there is a lack of training to carry out a truly effective business strategy.
- Companies note the lack of information on the possibilities offered by Social networks as marketing tool for SMEs.
- The Tourism industry doesn't have public information, date and quality, for use as an enhancer of their own sites. Available information is provided by companies themselves so that their time is not profitable. It is also available through end users, but it is impossible to establish a quality control information.

2.5. Success factors that encourage the use of Web 2.0

From the analysis stand out as most important success factors in web pages to the contents, simplicity usage and attractive design. Therefore, they should be equally for the use of social networks.



3 GUIDELINES FOR ROUTE 2.0 TRAINING IN EXTREMADURA

Awareness

Need to raise awareness about the benefits of the skills of social media marketing in the tourism. Proposed actions:

- Show specific examples of good experiences in the management of social networks by entities in the tourism sector.
- Focus on the benefit and cost effectiveness of the training by obtaining concrete and measurable results.
- Awareness targeted both the employer and employee.

Motivation

Need to incorporate emotional elements in the training activities to remove the frustration of the students. Proposed actions:

- Mixed methodology, using classroom and ICT training for online interactivity between the student and his/her instructor and the other students.
- System for assessing students by the trainer to achieve the expected results during the formative period.
- Provide effective and practical value to the student and his/her organization, focusing on the end result rather than the means used.

Appreciation

Need to increase the effectiveness of the training in the tourism. Proposed actions:

- Training package with an overall approach on tourism marketing so as to complete the cycle trip. This includes from the decision to travel to the various aspects that include the accommodation and even sharing the experiences as an example for diffusion.
- Development of actions aimed at specific modules customized to the needs of enterprises so as to make available to the stakeholders a wide range of options instead of large programs (training pills).



4 BEST PRACTICES IN SPAIN

The following link list shall give an overview of existing best practices of how tourism institutions can use social media effectively to promote themselves and to communicate better with their customers.

● Accommodations

▫ Légola

<http://www.facebook.com/profile.php?id=100003290139956&ref=pb>
<http://alberguevilluercas.blogspot.com>

▫ Balneario de Alange

<http://www.facebook.com/profile.php?id=100001152616237&ref=pb>

▫ Hotel Huerta Honda

<http://www.facebook.com/hhuertahonda?ref=pb>
<http://huertahonda.blogspot.com.es/>

▫ Hotel Las Bóvedas

<http://twitter.com/#!/HotellLasBovedas>
<http://pinterest.com/hotellasbovedas/>
<http://www.facebook.com/hotellasbovedas?ref=pb>

● Restaurants & Pubs

▫ Mi Vida Lola

<https://www.facebook.com/mividalola>

▫ Aldebarán

<http://www.facebook.com/profile.php?id=100001349048760>

▫ Baldoria

<http://www.facebook.com/baldoria.restauranteitaliano/info>

▫ Café-Pub Liverpool

<http://www.facebook.com/profile.php?id=100003222292444&ref=pb>

▫ Capitán Haddock

<http://www.facebook.com/profile.php?id=100003528660983&ref=pb>

▫ Duffin Dagels

<http://www.facebook.com/profile.php?id=100002434463137&ref=pb>
<http://duffindagelsbadajoz.blogspot.com.es/>

▫ La Bodega

<http://www.facebook.com/profile.php?id=100003164929359&ref=pb>
<http://twitter.com/#!/labodegacafebar>



• **Leisure and information**

▫ Lusiberia

<https://www.facebook.com/lusiberia>

<http://twitter.com/#!/lusiberia>

▫ Karting Talavera

<http://www.facebook.com/profile.php?id=100003199176130&ref=pb>

▫ Disfruta Extremadura

<http://www.facebook.com/disfrutaextremadura>

<http://twitter.com/#!/DExtremad>

<https://es.foursquare.com/dextremad>

<http://www.flickr.com/people/59753792@N06/>

<http://www.youtube.com/user/DisfrutaExtremadura?feature=mhum>

<http://disfrutaextremadura.wordpress.com/>

▫ Museo Carnaval de Badajoz

<https://www.facebook.com/people/Museo-Carnaval-de-Badajoz/100000865396993>

▫ Oficina de Turismo de Almendralejo

<http://www.facebook.com/odealmendralejo?ref=pb>

▫ Oficina de Turismo de Badajoz

<http://www.facebook.com/turismobadajoz?sk=wall>



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MITYC & Fundetec, 2012.

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