



ROUTE 2.0

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ROUTE 2.0

Needs Analysis Report for Cyprus

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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 Cyprus. 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 NETWORKS USAGE IN CYPRUS

In order to understand the context within which the tourism sector is operating in Cyprus it is extremely important to investigate the level of use of ICT and Social Media in the Cypriot Society. Depending on the level of use by their clients companies and institutions from the tourism sector can evaluate the benefits of to further engaging themselves in this field. Especially Social Media can be a powerful instrument in the tourism sector, if exploited correctly. Most of the people in Cyprus are using them already at different stages, from the search for information to the booking.

According to the Statistical Service of the Republic of Cyprus' annual survey 'Information and Communication Technologies Usage in Households and by Individuals 2011' an increase was observed in the individuals that used the internet during the first quarter of 2011 in Cyprus, from 52,2% in 2010 to 56,9% in 2011.

Individuals 16 - 24 years old (94.7%) and students (99.5%) are the more frequent internet users. This percentage decrease with age since only 7.8% of individuals 65 - 74 years old use the internet. Men are using the internet more frequently than women with percentage 61.2% and 54.3% respectively.

The most popular internet activities among Cypriots are finding information about goods or services, and reading/downloading online newspaper/magazines (84.9% and 63.8% of internet users respectively).

Internet access in households continues to increase in Cyprus, according to the Statistical Service of the Republic of Cyprus' annual survey 'Information and Communication Technologies Usage in Households and by Individuals 2011'. The internet was accessed at least once in 57.4% of the households in the first quarter of 2011, compared to 53.7% in 2010.

The main reason for households not having an internet connection was the lack of skills (63.9% of the households without access to the internet).

58.9% of internet users in Cyprus in 2011 are participating in social networks like facebook, twitter etc to the same survey.

Over the last years there has been a steady increase in broadband connections in Cyprus and a simultaneous decrease in narrowband connections (modem, ISDN). 86.6% of the households with internet access have a broadband connection (DSL) in 2011.



2 CURRENT USE OF ICT AND SOCIAL NETWORKS IN THE TOURISM SECTOR IN CYPRUS

According to the findings of the Statistical Service of the Republic of Cyprus' annual survey 'Information and Communication Technologies Usage in Households and by Individuals 2011' among individuals using the internet, 55.3% are using services related to travel and accommodation in 2011.

Among individuals using the internet, 15.7 % of persons made online orders for goods and services in 2011. Approximately half of them order travel arrangements (47.3%).

a) Field Work Development:

To identify the current use, barriers and needs in the use of Social Media in the tourism sector an evaluation has been conducted in Cyprus in December 2011 – March 2012. The evaluation was divided in three steps: a) sending out questionnaires to receive feedback from different fields of the tourism sector, b) phone interviews with people working in the tourism sector, c) expert workshop to discuss the current use and barriers to use Social Media more in detail.

➤ Distance consultation

For the distance consultation in Cyprus, First Elements Euroconsultants Ltd has contacted 20 institutions working in the tourism sector in Cyprus. Out of the 20 institutions 8 were from the accommodation sector, 9 from leisure services and 3 from tourism information sector.

➤ Phone interviews

The distance consultation was followed by more in depth phone interviews with 4 participant organisations.

➤ Expert Workshop

The expert workshop was held end of March with 3 external experts from the Cyprus Tourism Association, the Cyprus Hotel Association and the Association of Cyprus Tourist Enterprises.

b) Current use and knowledge of web 2.0 tools in the participant organisations

According to the collected data the majority of the participant organisations have a website and regard it as a powerful tool for their sales. Receiving feedback and devoting more time to sell are the main factors that could improve their Internet sales.

Facebook and Twitter are the main social networks used by the participant organisations, though Facebook is by far the most popular social network which is viewed as powerful depending on its use.

Lindekin is used only by some participants.

Most of the personnel who work in the tourism sector in Cyprus have received higher education. The personnel of the participant organisations receive training often mostly on Information and Communication skills.

Most of the hotels in Cyprus have a marketing manager.



The great majority of those participating in the survey are not aware of what a community manager is. Very few participants monitor the opinions clients have of their companies through chat forums, blogs etc.

The majority of participants that are aware of the possibilities given by the use of ICT and social networks have stated they are interested in receiving more training on both communication tools. However, there are others that are not aware of the possibilities therefore they show low interest in receiving training in this field.

Similar conclusions are reached by the expert panel. More precisely:

c) Benefits to use Social Media

Those who are familiar with social media they regard them as powerful tools for networking, for the production of more customer oriented and more customized products, for advertising. Nonetheless, many participants have expressed the opinion that social media should be managed with care; otherwise too much information can be chaotic for the recipient.

Furthermore, a substantial number of those participating in the survey have limited awareness of the benefits offered by these tools for businesses therefore are not in a position to express an opinion for example regarding the benefits in attracting new costumers, in facilitating information processing and in receiving feedback from their customers.

d) Barriers to use Social Media

- Limited awareness of the possibilities offered by the social media: Though the majority of the personnel working in the tourism sector in Cyprus is highly educated and use some social media in their private lives, they are unaware of the possibilities offered for the companies they worked for. They are not aware how they can reach their customers more effectively through Social Media, how they can communicate through them and what is the best way of approaching their potential clients.
- Fears of limited Safety: People are concerned as regards data protection when using Social Media applications. This is also related to companies as they feel uncertain about the security of Social Media.
- Lack of time: Often the small tourism institutions just do not have the time to take care on additional marketing channels such as Social Media.

e) Success factors that encourage the use of Web 2.0 in the tourism sector

It has become evident from the feedback received that the majority of those involved in the tourism sector are not satisfactorily informed or skilled on how to apply social media for promoting their businesses. At the same time, a great percentage of them are highly educated and computer literate which means that with trainings focusing specifically on the use of web 2.0 in their business sector, they will be in a position to apply these tools with great benefits for their companies.



3 USE OF WEB 2.0 TOOLS WITH IN TRAINING COURSES FOR TOURISM IN CYPRUS

Following the regional consultation a possible workshop organisation to train people from the tourism sector in the use of social media focusing specifically on their businesses should address the following:

- Questions related to Social Media such as clear identification of the target group, specific communication methods, topics to be focused on, the advantages of each social medium and when it should be used.
- Legal questions related to Data protection and Copyrights

It will be important for the participants to identify successful business cases prior coming to the trainings in order to understand how competitors on a national or international level apply successfully the social media in promoting their work

4 BEST PRACTICES IN CYPRUS

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:

a) Accommodations

- Caraffa Bastione
<http://www.facebook.com/caraffabastione>
- Royiatiko Hotel
<http://www.facebook.com/#!/pages/ROYIATIKO-HOTEL-NICOSIA/213534133342>
- Amathus Hotels
<http://www.facebook.com/#!/amathushotels>

b) Leisure

- Satyriko Theatre
<http://www.facebook.com/rialtotheatre#!/profile.php?id=1690161852>
- Taxidiamprosta
<http://www.facebook.com/rialtotheatre#!/taxidiamprosta>
 - Scarabeo
<http://www.scarabeoisland.com>



5 REFERENCES

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2. 'Information and Communication Technologies Usage in Business' by the Statistical Service of the Republic of Cyprus' annual survey
3. Internet World Stats, <http://www.internetworldstats.com/europa.htm>
4. New Media Trend Watch, <http://www.newmediatrendwatch.com/markets-by-country/10-europe/41-cyprus>
5. Nation Master, <http://www.nationmaster.com/country/cy-cyprus/int-internet>
6. Economy Watch, http://www.economywatch.com/economic-statistics/Cyprus/Internet_Statistics/