



ROUTE 2.0

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Results of the Baden-Württemberg 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 Baden-Württemberg (D). 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 THE USE OF ICT AND SOCIAL MEDIA IN GERMANY

An important precondition for an effective use of Social Media in the tourism sector is that the society as such is already capable to handle and to work with those instruments. This has an important influence on the necessity of the companies and institutions from the tourism sector to further engage themselves in this field. Especially Social Media can be a powerful instrument in the tourism sector, if exploited correctly. Most of the people in Germany are using them already at different stages, from the search for information to the booking.

From the general ICT and Internet use in Germany the initial position is very good. In 2011 73,3 % of the German population are using the internet regularly.¹

According to a recent study of the German Federal Association for Information Technology, Telecommunications and New Media (BITKOM 2011; Zweite, erweiterte Studie 12/2011)², the situation concerning the use of Social Media in Germany in 2011 was the following: 74% of the Internet users was registered to a Social Network, 66% from them defined them as active user.

Some differences can be noticed according to the age: referring to people from 14 to 29 years old, the percentage of active users rises until 85%.

The sex of the users also seems to be relevant: 71% of women show that they are more willing to use Social Media actively than man as only 61% of them are currently active Social Media user.

The different variety of existing Social Media allows the user to choose between them or to join more than one: the report of BITKOM shows that, on average, active users are registered to 2,3 different Social Networks. This number raises to 2,5 if we consider just people under 30 years old.

Facebook appears to be the most popular Social Media, with a share of 45% active users. Again, the percentage rises to 67% from 14 to 29 years old. 59% of the active users visit the favourite Social Network daily. Whereas Microblogging tools such as Twitter is only used actively by 3%.

Although most of the people still access Social Networks from PCs or laptops (71% and 69%), 2011 shows a clear raise in the use of smartphones (22%) and tablets (7%).³

Particularly evident is the raise in the use of the mobile broadband, which replaces the landline broadband connection.

Statistics from BITKOM also show how especially young community members are using Social Media as a tool to access information. 34% of people between 14 and 29 years and 23-24% in the other age range use this possibility. Information that must be considered also as a communication tool with firms: 14% uses Social Media also to collect information about brands and products. ("Soziale Netzwerke - zweite erweiterte Studie", BITKOM, 2011, p.6).⁴

¹ ARD/ZDF-Onlinestudie 2011, <http://www.ard-zdf-onlinestudie.de/index.php?id=onlinenutzungprozen0>

² BITKOM 2011; „Soziale Netzwerke - Zweite, erweiterte Studie 12/2011; http://www.bitkom.org/files/documents/BITKOM_Publikation_Soziale_Netzwerke_zweite_Befragung.pdf

³ BITKOM 2011, "Überall sozial vernetzt"; http://www.bitkom.org/de/markt_statistik/64018_70783.aspx

⁴ BITKOM 2011, "Soziale Netzwerke – Zweite, erweiterte Studie"; http://www.bitkom.org/files/documents/BITKOM_Publikation_Soziale_Netzwerke_zweite_Befragung.pdf



2 STATUS ON THE USE OF SOCIAL MEDIA AND INTERNET RELATED TO TOURISM

BITKOM researches help to have an overview of the situation from the point of view of the private users, where booking also appears to be always more connected with ICT and Social Media. Comparing the data from 2009 with those of 2011, it appears clearly: in 2011 31 millions of Germans booked their holidays in the Internet. In 2009 they were just 16 millions. The most booked items are flight tickets and overnights: the people who bought flight tickets online increased from 16 to 19 million from 2009 to 2011, while the number of people who booked a hotel room increased from 13 to 15 million, according to two researches of BITKOM.^{5 6}

Train tickets, car rental and all-inclusive have been sold online to 13 (train ticket) and 9,6 (both car rental and all-inclusive) millions of people.

There is no meaningful difference between men and women, but the age appears to be relevant: particularly willing to book online are people between 30 and 64 years old. Under the average is, on the opposite, the Internet-generation, composed by people from 14 to 29 years old.⁷

The TOUROM-Studie 2011 "Social Media in der Reisebranche"⁸, conducted by Touristik Consulting, analyses the use of Social Media in tourism companies both concerning the use of the firm itself and concerning the use of the employees working in the tourism sector. As regards the employees, 91% of the interviewees stated that through Social Media they accessed useful information that they would not have received in other ways. More than two-thirds of the interviewees are connected to other companies from the tourism sector through Social Media and receive relevant news for their jobs through those channels.⁹

According to the results of the TOUROM analysis on how companies in the tourism sector use Social Media, Facebook is the most used Social Media instrument (48%), followed by Twitter (33%) and Google Places (23%). But these instruments are not fully exploited: just 38% of the websites have a link to the Facebook page and also the connection to other Social Media channels appears to be very weak. Not all the functions available are then fully exploited, for example just 23% of the companies interviewed state to use the Event function on Facebook. As regards the communication through Social Media, companies from the tourism sector consider travel reports, company news, special offers, contests for fans and competitions as the most interesting content for the customer.¹⁰

Just 15% of the interviewees state to monitor Social Media and just in few cases professional support that would enable more effective monitoring, is involved. 71% of the interviewees also state not to have an effective Social media strategy, and on average just 8,9% of the budget is used for Social Media.¹¹

⁵ BITKOM 2009, "16 Millionen Deutsche buchen Reisen im Web" ;
http://www.bitkom.org/files/documents/BITKOM_Presseinfo_Reisebuchung_12_03_2009.pdf

⁶ BITKOM 9 March 2011, "31 Millionen Deutsche buchen Reisen im Web";
http://www.bitkom.org/de/presse/70851_67230.aspx

⁷ Ibid.

⁸ Michael Faber Touristik Consulting (2011), TOUROM-Studie 2011: Social Media in der Reisebranche –Highlights;
http://www.touristikconsulting.de/download/TOUROM_Studie_2011_Highlights.pdf

⁹ Ibid., slide 15

¹⁰ Michael Faber Touristik Consulting (2011), TOUROM-Studie 2011: Social Media in der Reisebranche –Highlights;
http://www.touristikconsulting.de/download/TOUROM_Studie_2011_Highlights.pdf, slide 23

¹¹ Ibid., slide 14



The statistics also illustrate that if on one side the users are already using Social Media to collect information and organise their travels, on the other hand companies and institutions from the tourism sector are still missing a true strategy to reach the tourists. The users are then ready to take advantage of an offer which is not that broadly available yet.

3 CURRENT USE OF SOCIAL MEDIA IN THE TOURISM SECTOR IN BADEN-WÜRTTEMBERG

To identify the current use, barriers and needs in the use of Social Media in the tourism sector an evaluation has been conducted in Baden-Württemberg from 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.

a) Distance consultation

For the distance consultation in Baden-Württemberg MFG Baden-Württemberg has contacted 106 institutions working in the tourism sector in Baden-Württemberg at the beginning of December 2011 by a questionnaire sent via email. Out of the 106 institutions 31 were from the accommodation sector, 40 from leisure services and 35 from tourism information sector. 2 institutions from the leisure service sector and 5 institutions from the tourism information sector sent the filled in questionnaire back.

b) Phone interviews

The distance consultation was followed by more in depth phone interviews with representatives from information (Tourismus Marketing GmbH Baden-Württemberg), from companies representative (Chamber of Commerce and Industry Stuttgart), from the education and companies side (Chamber of Commerce and Industry Northern Black Forest/ IHK Tourismus Akademie). Those interviews were conducted in January 2012.

c) Expert Workshop

The expert workshop was held in Stuttgart in March 2012 with five external experts from Tourismus Marketing GmbH Baden-Württemberg and Stuttgart Marketing GmbH. Both institutions are representing regions as well as companies from the tourism sector.

Within this whole consultation process the following status quo concerning the use of social media, the needs to improve this use and barriers not to use social media has been identified in Baden-Württemberg:

3.1 Barriers to use Social Media

- Lack of digital literacy: The lack of digital literacy is a big issue for the people working in the tourism sector in Baden-Württemberg. Often people still do not feel that comfortable to work with Social Media or still have difficulties to work with the internet as such. Thus they do not see any benefit and necessity at all to start using Social Media.
- 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 confidence: Companies, employers often block Social Media in their system as they do not rely on their employees. This implicates that the employees cannot start testing how to use Social Media in their business context.
- 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. Those who can afford it subcontract this task to an external service provider.
- Lack of awareness on the benefits: Institutions often still do not know
 - a) how to reach their customer more effectively through Social Media
 - b) what to communicate through web 2.0 channels
 - c) what to offer when communicating through Social Media
- Lack of Social Media Strategy: People do not know how and what they should communicate through Social Media. Using Social Media is not done just by setting up a Twitter channel or a Facebook account the management board also has to be aware that it requires additional resources. It has to be organised in an organisation which person has to take care on which topic. Often one person is responsible for communication but does not know the topics in that detail which can affect the Social Media communication.

3.2 Benefits to use Social Media

Due to the lack of knowledge on how to use Social Media most are still not aware of the concrete benefits those channels are offering them, such as the chance

- to speed up information processing
- to attract new customers
- to disseminate additional information
- to receive direct feedback from their customers on the service
- to observe what the competitors are doing
- to increase the search engine optimisation (SEO)
- to address the customer, target group more directly – “push function”
- to receive marketing support for free when other Social Media users reference to your post which again speed up and broaden information processing – “virality”
- to communicate more authentic

3.3 General success factors for effective Social Media usage

To ensure an effective Social Media usage the following success factors were identified throughout the regional analysis in Baden-Württemberg:

- Selection of interesting topics to be promoted through Social Media channels, selection of topics which can easily be covered by your organisation
- Communicating interesting information, good pictures, short movies etc.
- Development of personal feeling what is interesting for the target group



- Offering tailored trainings demonstrating how effective communication through Social Media channels works

4 POSSIBLE WORKSHOP ORGANISATION

Following the regional consultation a possible workshop organisation to train people from the tourism sector in the use of social media could be:

- a) Addressing people with little digital literacy skills
 - General introduction into the different digital media channels within a one day face-to-face training
 - ➔ What is a website? How can you use this medium to communicate with, to inform your target group?
 - ➔ What is Social Media as such?
 - ➔ What is Facebook, Twitter, Flickr, Blog and how can you use those media for communication and marketing reasons?
 - ➔ Step-by-Step introduction
 - Online follow-up phase within which the participants can start using Social Media on their own but still have the possibility to ask the trainer for a feedback online. This whole procedure will promote the participants' digital literacy.
- b) Addressing people with Social Media knowledge
 - Generally this training course should be more strategic oriented and more interactive e.g.
 - ➔ Questions related to Social Media:
 - What is my target group?
 - What can I communicate?
 - Which topic should I focus on?
 - What is the correct writing style in Social Media?
 - Which Social Media channel can be used for which reason?
 - ➔ Legal questions:
 - Data protection
 - Copyrights
 - ➔ One scenario could be: Participant must set up a Facebook account before the face-to-face training starts, during the training he/she sets up an additional account for his work and learns how to link both accounts, what he/she has to respect not to mix up working with both accounts, which information can be published, how to write those news etc.
 - Also this one day face-to-face course should be a blended learning scenario to allow the participants to further elaborate and exchange the imparted knowledge during an online phase.



5 BEST PRACTICES IN BADEN-WÜRTTEMBERG

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 and interact better with their customers/target group:

a) Regions, cities:

- Stuttgart
<http://www.stuttgart-tourist.de/index>
- Baiersbronn
<http://www.facebook.com/pages/Baiersbronn-im-Schwarzwald/116240525054773>
- Region Hochschwarzwald
<http://www.facebook.com/hochschwarzwald>
<http://twitter.com/hochschwarzwald>
<http://www.flickr.com/photos/hochschwarzwald>
<http://www.youtube.com/user/HochschwarzwaldTV>
- Heidelberg
<http://www.heidelberg.de>
- Tourismus Marketing GmbH Baden-Württemberg
<http://www.facebook.com/pages/Wir-sind-S%C3%BCden/189162484437324>

b) Accommodations

- Hotel Bareiss
<http://www.facebook.com/hotelbareiss>
- Traube Tonbach
http://www.facebook.com/traubetonbach?v=app_133049673371940&ref=ts
- Landhotel Talblick
<http://twitter.com/Zauberhaftchen>
<http://de-de.facebook.com/pages/Landhotel-TalblickS/154935794547936>

c) Leisure

- Palais Thermale, Bad Wildbad
<http://www.facebook.com/palais.thermal>
- Europapark Rust
<http://www.europapark.com>



6 REFERENCES

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<http://www.ard-zdf-onlinestudie.de/index.php?id=onlinenutzungprozen0>
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http://www.bitkom.org/files/documents/BITKOM_Presseinfo_Reisebuchung_12_03_2009.pdf
3. BITKOM 2011, "Überall sozial vernetzt";
http://www.bitkom.org/files/documents/BITKOM-Presseinfo_Soziale_Netzwerke_mobil_22_12_2011.pdf
4. BITKOM 2011, "Soziale Netzwerke - zweite erweiterte Studie";
http://www.bitkom.org/files/documents/BITKOM_Publikation_Soziale_Netzwerke_zweite_Befragung.pdf
5. BITKOM 2011, "31 Millionen Deutsche buchen Reisen im Web",
http://www.bitkom.org/files/documents/BITKOM_PI_Online-Buchungen_Reisen_und_Urlaub_09_03_2011.pdf
6. Michael Faber Touristik Consulting (2011), TOUROM-Studie 2011: Social Media in der Reisebranche –Highlights;
http://www.touristikconsulting.de/download/TOUROM_Studie_2011_Highlights.pdf