

Online Communication in Spanish DMOs. The view of practitioners

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Abstract

Information and Communication Technologies (ICTs) have had a significant impact on both the travel and tourism experience and industry. In particular, Destination Marketing Organizations (DMOs) have found ICT a powerful ally to harmonize and coordinate the activities of local stakeholders, as well as to reach travellers. The aim of this research is to analyse destination brand communication strategies, especially those applied to online communication (official websites, social media and mobile applications). Data was collected from Spanish destinations – regions, provinces and cities - via an online survey addressed to destination brand and communication managers. Results show that destination brand communication is not fully standardised or professionalised yet; online tools (websites, social media and mobile applications) are used tactically and not strategically and the usefulness of social media and official websites is clearly more appreciated by DMO managers than the usefulness of mobile applications.

Keywords

DMO, online communication, destination brand, website, social media, mobile application, web marketing adoption.

1. Introduction

Online communication has become crucial for tourist destinations. Traditional channels of promotion are still powerful means of communication, but they have lost momentum due to the increasing prominence of online communication platforms, such as websites, social media and mobile applications. This new and challenging scenario has forced Destination Marketing Organizations (DMOs) to adapt their communication strategies in order to fit in with consumers' new habits, to enable increased engagement with target audiences and maintain output of interesting, up-to-date and inspirational content (VisitBritain, 2013). As Morrison states, "the destination marketing and promotion role of destination management was the first to feel the effects of ICT innovations" (2013: 369). Indeed, ICT developments, Web 2.0 in particular, provide new opportunities for collaborative tourism destination marketing, as well as idea and knowledge exchange (Park and Gretzel, 2007; Ip, Law and Lee, 2011; Inversini, Cantoni and De Pietro, 2014).

However, this creates challenges, such as taking a tactical/passive perspective rather than a strategic/proactive one. Moreover, trial-and-error approaches to new communication channels, all set within the context of professional organizations whose culture, expertise, and educational backgrounds are no longer adequate for the radical shift in consumer behaviour and the emerging requirements of the tourism market and industry (Munro and Richards, 2011), as well as the complexities of developing coherent destination information and branding add to the challenge of effective and efficient online communications by DMOs.

Due to increased budgetary pressures, DMOs are forced to invest in web marketing activities in order to reach local and international audiences (Hays, Page and Buhalis, 2013). The Internet is a flexible tool to promote tourism destinations worldwide and can be integrated with destination databases to enhance distribution channels, as well as influencing collective opinions about destinations and encouraging engagement through user-generated content (Munar, 2011; Ayeh, Au and Law 2013). However, critical success factors for managing the web presence of a DMO are still under-researched.

Analysis of web marketing strategies confirm how analytical approaches to web activities enable organizations to improve their web marketing strategies to more effectively reach their audiences (Xiang and Gretzel, 2010). However, researchers have focused mainly on the adoption of web marketing activities, in particular factors that integrate the management of information and knowledge flows at different stages of effective technology use in a tourism organization (Gretzel and Fesenmaier, 2004; Marchiori et al. 2012; 2013).

In this research context, analysis of the maturity of an organization provided an opportunity to research the understanding of DMO managers towards the usefulness of the adoption and implementation of web marketing activities. Indeed, the analysis might help in identifying the drivers for a successful integration of those activities in the business of an organization. Therefore, this study will contribute to literature on

maturity and adoption and implementation of web marketing activities in the tourism sector.

In this paper we present an empirical research focused on the perspective of practitioners (Hankinson, 2010), with the aim of understanding how Spanish DMO managers conceive online communication, the opportunities and limitations of websites, social media and mobile applications, how DMOs are actually organised and their brand strategies and online communication goals.

2. Literature review

2.1. The need for innovation in Destination Marketing Organizations

Carson and Jacobsen (2005) propose that innovation is central to achieving sustainable, adaptive and competitive tourism development. Destinations, and businesses within destinations, need to constantly achieve competitive advantage and innovation is an important factor in successful competitive advantage (Walder, 2006). Innovation is fundamental to tourism because of the pace of change within the sector and because trends drive the industry, hence, tourism has to adapt to meet tourist needs and expectations.

Schumpeter's (1934) seminal work on industrial innovation established five innovation typologies: introduction of a new good or improvement to the quality of an existing good; introduction of a new method of production; opening of a new market; new source of supply of raw materials or part-made product; and creation of a new type of industrial organization. Using these typologies, online communication illustrates a new method of production, in terms of the ways in which DMOs now have to communicate with their existing and potential consumers.

Schumpeter's typologies have been further developed, e.g. Hjalager (2002) proposes: product innovations; process innovations; management innovations; logistics innovations, and institutional innovations; whilst Wan, Ong and Lee (2005) suggest a three-fold typology: technical/administrative innovations; product and process innovations; and radical and incremental innovations.

Sundbo, Orfilas-Sintes and Sørensen (2007) suggest that tourism innovation is not always technological, nor necessarily a new product, but can be a change in business behaviour, creating a culture shift which positively changes the way in which the business operates, so as to achieve competitive advantage, such as embracing the conversation culture and the informal exchanges that underpin user-generated content.

If this concept is developed at a destination-level there are a range of factors that are critical to the successful development of innovative tourism destinations: calculated but risk-taking leadership; internal and external stakeholder collaborations and interaction; market knowledge; identification and adoption of new ideas and technologies (Jacobsen, 2005; Scottish Enterprise, 2007).

Here, some ideas from the classical work by Rogers (2003) could be useful. The pace at which DMO managers would embrace an innovation (eg. social media use, mobile applications) could be labelled as the rate of adoption, determined by the relative advantage, the compatibility, the complexity, triability and observability of the new product or practice. Rogers also differentiates between innovation adoption and innovation implementation, where implementation “involves overt behaviour change as the new idea is actually put into practice. It is one thing for an individual to decide to adopt a new idea, quite a different thing to put the innovation to use, as problems in exactly how to use the innovation crop up at the implementation stage” (2003: 179).

In this sense, the Technology Acceptance Model (TAM) examines users’ acceptance towards technology. In particular, the model identifies two main factors affecting user’s technology acceptance: perceived usefulness and perceived ease-of-use (Davis 1989). In this direction, organizational learning literature underlined how knowledge transformation involves an organization’s ability to develop and refine the internal routines that facilitate the integration of new knowledge with existing knowledge (Camison and Fores, 2010). Hence, for a tourism organization dealing with various online communication opportunities, the integration of results from the analysis of web marketing activities into strategic business decisions might drive the evaluation of web marketing performance (Marchiori et al., 2012; 2013).

In the tourism domain, three stages of technology adoption and use by tourism organizations have been recognized (Gretzel and Fesenmaier, 2004): stage 1, low use of IT and knowledge management; stage 2, moderate use of IT and knowledge management; stage 3, high use of IT and knowledge management. At stage 3 functions are highly interactive and more likely to serve strategic rather than operational management needs.

2.2. The role of the online communication in tourism

New information technologies and the Internet have had a significant impact on the way tourist destinations promote their brands. This fact has prompted those responsible for communicating destinations to turn their attention towards these new tools and how they may be used to influence and enhance the branding process, and in turn manage their reputation in online media (Munro and Richards, 2011; Marchiori and Cantoni, 2012).

Online communication makes decision-making and purchase processes easier (Buhalis and Law, 2008). It can also generate virtual perceptions that complement traditional, in situ traveller experiences. What is more, it creates value for brands, builds relationship between destinations and visitors and generates an image that influences visitors’ intentions when choosing a place to travel to. Therefore, at a time when destination branding is vital to effective global marketing and future tourism development, the importance of online branding comes to the fore.

Official websites have developed at a furious pace and have become an important tool in destination marketing (Palmer, 2005; Choi, Lehto and O’Leary, 2007; Park and

Gretzel, 2007; Fernández-Cavia and Huertas, 2009; Li and Wang, 2010). Through their design, content and resources, websites are able to convey both place strength and its intangible emotional values (Fernández-Cavia et al., 2014). Furthermore, they must be capable of providing virtual experiences and capturing potential visitors' attention (Lee and Gretzel, 2012; Luna-Nevarez and Hyman, 2012).

Yet the real revolution in tourism communication is now to be found in social media (Xiang and Gretzel, 2010), which promote interactivity among the users themselves; a set of channels which transforms users from receivers into senders. Travellers can now show and share photographs and videos quickly, easily and in an attractive format (Lim, Chung and Weaver, 2012). The shift away from information culture to conversation culture facilitates comments on destinations, services offered and personal experiences (Jacobsen and Munar, 2012). It is the users themselves who want to share experiences and information and it is they who wish to know the views of other users (Bronner and Hoog, 2011). User-generated content is an online version of word-of-mouth which generates greater trust and credibility than destination official information providers, "relentlessly pushing our destination brand to an increasingly sceptical audience is becoming less effective..." (Munro and Richards, 2011, p. 141) as, in the virtual space, destinations are defined and re-defined by networked conversations and communities.

Today, interpersonal influence and word-of-mouth are generally recognised as one of the most influential information resources which come into play when a user decides where to go and what to buy in the world of tourism (Ayeh, Au and Law, 2013). This is because, in the tourism sector, products are intangible and impossible to evaluate prior to their consumption. Furthermore, travel is one of the most expensive items in a person's annual budget. For these reasons, other users' experiences and opinions are influential in the decision to buy (Litvin, Goldsmith and Pan, 2008) as they reduce the perceived risk and the degree of uncertainty. The other side of the coin is that DMOs tend to fear negative comments from users and the influence that such comments may have on a destination's image and reputation.

Another important challenge is posed by the increased use of mobile devices (Tussyadiah, 2013). Smartphones can enhance any stage of the travel experience, whether the anticipatory phase, the experiential phase or the reflective phase, and DMOs should pay attention to this new channel (Hyun, Lee and Hu, 2009; Wang, Park and Fesenmaier, 2012; Stienmetz, Levy and Boo, 2012). Mobile applications, although not utilised to their full potential yet (Fernández-Cavia and López, 2013; Kwon, Bae and Blum, 2013), are seen as one of the most powerful communication platforms for the future.

To face all these challenges, DMOs try to adapt their communication strategies, engaging with every new medium that becomes popular with consumers, e.g. Facebook institutional profiles, Twitter official accounts, interactive websites, Instagram, mobile apps or Youtube channels are now common for destinations, to enable them to effectively reach existing or potential consumers, as DMOs assume that a solid and

differentiated destination image is vital for the attraction of tourists (Blain, Levy and Ritchie, 2005).

However, little research has been conducted on how DMO managers understand all these new tools and how they think they should be used, which is the main goal of this paper. Therefore, the following research questions have been elaborated:

RQ1: What is the stage of adoption by Spanish DMOs when it comes to official website, social media, and mobile apps?

RQ2: How are such communication channels perceived by DMOs, when it comes to their usefulness?

3. Methodology

The aim of this study is to understand how Spanish DMO managers envisage and plan their online communications. In order to analyse the practitioner's point of view, an online survey was designed and conducted.

All main Spanish DMOs were included in the research, namely all official regions, provinces and capital cities to a total of 129 destinations, previously identified and contacted by phone or email. In each DMO we targeted a single respondent. Due to the lack of standardization, identifying the right person in each organisation was in itself a hard task, as the titles and positions were quite diverse, but in all cases we ensured that a professional who understood the brand communication process answered the questions.

Brand and communication managers accessed an online platform where they could complete and submit the questionnaire. Up to three rounds of personal emailing were sent directly to the executive by name, and an additional telephone call was made if required. The survey invitations were initially sent at the beginning of December 2012, and the data collection closed at the end of January 2013. Of the 129 invitations circulated, we received 56 completed questionnaires, resulting in a high response rate of 44.8%.

The questionnaire was organised into four sections: Section 1 asked for information about respondents and the DMO, socio-demographic information and context such as gender, age, title, educational background, name of the department or number of people working in it.

Section 2 included questions about brand strategy, the destination's marketing and communication plan, who were they aimed at, positioning and values of the destination brand, and so on. Section 3 asked what communication channels the DMO used, objectives, advantages and disadvantages for the official website, social media and mobile applications.

Finally, Section 4 focused on how respondents valued and assessed the importance of official websites, social media and mobile applications for the general destination communication strategy.

Statistical data analysis was carried out using SAS v9.2 and applying chi-square, Fisher test and the non-parametric Mann-Whitney U or Krusal-Wallis test when a bivariate analysis was required.

4. Results

4.1. Brand strategies

The DMOs present in the sample were one of four different kinds: capital cities –cities that are the administrative centre of an area or territory called ‘province’; provinces – fifty divisions of the whole country; regions –larger areas, with some political autonomy, formed by one or more provinces, known in Spain as Autonomous Communities; and islands –that are promoted rather independently.

Table 1. Level of DMOs (n = 56)

	Number	% of the sample	% of total number of destinations of the same type in Spain
Capital cities	25	44.6	50.0
Provinces	19	33.9	38.0
Regions	8	14.3	47.1
Islands	4	7.1	36.4

Spanish DMOs are commonly public organisations under the authority of the City Council, a Provincial or County Council or the Regional Government. Only in a few cases these organisations are conceived as a rather independent agency (such as Turisme de Barcelona, in Barcelona, or Basquetour, in País Vasco). This means that their work is often highly dependent on political decisions. As this could create bureaucratic difficulties or represent a burden, managers in the survey were asked how many internal departments intervene in the decision-making process of destination brand communications.

The average number of departments involved in the decision-making process is three, and that suggests a fairly-shared responsibility -when not blurred- and probably a consensual but also slow response to challenges. For example, in a specific destination surveyed, the decision-making process involves the Public Promotion Company, the Provincial Council, the Marketing Department and the Communication and ICT Department.

When asked about the marketing and communication plans, it is noteworthy that nearly half of the DMOs declared not having one. This indicates that a great number of DMOs are using promotion and communication channels without having a formally agreed marketing and communication plan.

Table 2. Strategic planning at Spanish DMOs (n = 56)

	Marketing Plan	Communication Plan
Yes	30	29
Being developed	12	14
No	14	13

Regional DMOs are more likely to have a marketing and communication plan (62.5% for an overall mean of 53.6%, and 75.0% for an overall mean of 51.8%), maybe indicating that the bigger the geographical remit of the DMO, the better planned its marketing and communication strategy.

For those DMOs who had a communication plan or who were working on it, we also asked who were the main target groups for those plans. The “Others” category responses included mass media (5 cases), Spanish students (1) and immigrants (1).

Table 3. Target groups for the communication plans (n = 43)

	Number of DMOs	% of DMOs
Domestic visitors	42	97.7
International visitors	39	90.7
Local residents	29	67.4
Brokers/agents	22	51.2
Companies and investors	20	46.5
Others	7	16.3

International visitors are given more consideration in those destinations which have a marketing and communication plan (100%) than in those without one (76.5%) (p-value = 0.0193).

We also asked each DMO what online communication channels they used to promote their brands, other than the main official website. We offered ten possible choices plus an “Others” open category. The responses show a clear predominance of Facebook, Youtube and Twitter, whilst mobile applications, image hosting services, blogs and microsites are not commonly used.

Table 4. Online communication channels used by Spanish DMOs (n = 56)

	% of DMOs
Social networks (such as Facebook)	96.4
Video hosting services (such as Youtube)	80.4
Microblogging platforms (such as Twitter)	76.8
Mobile applications	55.4
Websites (others than the official main one)	55.4
Image hosting services (such as Flickr)	50
Blogs	42.9
Microsites	32.1
Location-based social networks (such as Foursquare)	23.2
Social bookmarking services (such as Delicious)	5.4
Others	14.3

The “Others” category includes responses such as Trivago, Tripadvisor, Minube, or corporate blogs.

Some of these channels are more often used by those destinations which have a marketing and communication plan, and this might reveal that systematic and strategic planning encourages use.

Table 5. Online communication channels used by Spanish DMOs (n = 56)

	Having a marketing plan (%)	Not having a marketing plan (%)	<i>P-Value</i>
Video hosting services (such as Youtube)	93.3	65.4	0.0087
Microblogging platforms (such as Twitter)	86.7	65.4	0.0599
Image hosting services (such as Flickr)	66.7	30.8	0.0074
Blogs	56.7	26.9	0.0249
Microsites	50.0	11.5	0.0021

4.2. Functions and perceived usefulness of official websites

Every DMO has its destination brand, and every destination brand has its official website. But what are the goals of this official website, what is the purpose of this communication channel? To find out the answer, at least from the practitioners’ point of view, we asked DMO managers. Unsurprisingly, informational and promotional aims were the most cited.

Table 6. Aims for the destination's official website (n = 56)

	% of DMOs
To inform about the destination	98.2
To achieve visibility	85.7
To attract the target groups	82.1
To communicate brand image	75
To convey the brand personality	71.4
To promote users' participation	64.3
To hold the target audience's attention and ensure their return	58.9
To interact with the target public	46.4
To learn about the target audience preferences	37.5

At the end of the list, we find objectives related to creating a relationship between the DMO or the brand and the target groups. This could indicate that the interactivity features that official websites can provide are not much appreciated by DMO brand and communication managers.

As official websites' main advantages, managers highlight the adequacy, reliability and rigour of the information provided the fact that any user in any part of the world can access the information at anytime, the control of the content, and the low cost of the medium. As main disadvantages, they emphasize that not every potential visitor navigates the Web, that frequently the information is not attractive, the lack of dynamism and personalisation, and the official nature of the discourse can become a straitjacket.

The usefulness of the official website in the global communication strategy of the destination brand was rated as "Very important" by 66.1% of the managers in the sample.

We also enquired about the counselling services demanded by DMOs in order to design and maintain their websites. 53.6% of the managers surveyed declared they receive regular counselling that comes from internal departments, external programmers, consultants, communication agencies or research companies.

4.3. Functions and perceived usefulness of social media

As expected, Spanish DMO managers conceptualise social media as a more participatory tool, clearly superior to official websites when it comes to encouraging users' participation (85.7 versus 64.3%), to interact with the target public (82.1 versus 46.4%) and to learn about target audience preferences (62.5 versus 37.5%).

Table 7. Aims for social media (n = 56)

	% of DMOs
To inform about the destination	89.3
To promote users' participation	85.7
To interact with the target public	82.1
To attract the target groups	82.1
To convey the brand personality	62.5
To learn about the target audience preferences	62.5
To communicate brand image	60.7
To hold the target audience's attention and ensure their return	58.9

As social media's main advantages, they stress the immediate response, the direct communication between DMO and tourists, the fact that most of these social media tools are free, and the constant feedback they offer. As major drawbacks we can find that some segments of population are not reached, that destinations must face some negative opinions, narratives and reviews, and that social media must be quickly and efficiently managed –and then the regular attention of some specific professionals is needed.

The usefulness of social media in the global communication strategy of the destination brand is rated as “Very important” by 76.8% of the managers in the sample. 53.4% of them also declared receiving some regular counselling, principally from internal departments, consultants, communication agencies or external programmers. External programmers are most demanded by regions (75% - p-value = 0.0249).

4.4. Functions and perceived usefulness of mobile applications

For a destination brand, what is the purpose of having a mobile application? This is not so clear when we look at the results of the survey. Neither of the options gets more than a sixty per cent of choices, being the first one “to inform about the destination”. In fact, the four options most cited are the same as the ones we can find for social media, but all of them with a lower number of choices.

These results seem to suggest that the participatory aim of mobile applications is obvious but the usefulness of the tool is not so evident. The idea is confirmed when we look at the results of another question in which we asked to rate the usefulness of mobile applications in the global communication strategy of the brand. Only 35.7% managers on the sample considered it as “Very important” (compared to 66.1% for the official website, and to 76.8% for social media, as we said before).

Table 8. Aims for mobile applications (n = 56)

	% of DMOs
To inform about the destination	57.1

To promote users' participation	44.6
To interact with the target public	35.7
To attract the target groups	35.7
To communicate brand image	35.7
To hold the target audience's attention and ensure their return	35.7
To convey the brand personality	32.1
To learn about the target audience preferences	25

One of the aims, “To communicate brand image”, rates clearly higher for regions at the three channels: 100% for official websites, 87.5% for social media and 83.3% for mobile applications, suggesting that the biggest destinations have the clearer awareness of the importance of the brand.

The main advantages for mobile applications, as a communication tool for destination brands, following the opinion of the practitioners, are that the user can be addressed during the trip and at the destination, the immediate response, the possibility of personalization and geolocation, and the ease of use. One of the most significant disadvantages highlighted by managers is that not everybody has a smartphone, followed by the poor – or lack of - connectivity or coverage in some areas and the limited dimensions of the screen. 58.9% of DMOs in the sample admit to receive some regular counselling, principally from external programmers and communication agencies.

5. Conclusions

Online communication tools are widespread among Spanish DMOs, demonstrating how intensely they have embraced new consumer habits and sought to innovate in terms of online communication as a new method of production (Schumpeter, 1934). Apart from the official website, social networks are the option most used, followed by video hosting services and microblogging platforms.

Mobile applications are not so widespread, and this fact allows us to suggest that, in the Spanish context, official websites can be considered in a stage 3 of adoption, i.e., when technology is commonly used, understood and strategically planned; social media can be considered in a stage 2 of adoption, as although they are widely used, they are scarcely formally planned; and mobile applications must be considered in a stage 1 of development, as its low use is combined with low perceived usefulness by DMO managers.

Moreover, results showed how web marketing activities are not fully standardised (e.g. presence of a marketing plan), suggesting a disperse approach in the promotion of the territory amongst tourism professionals. DMOs' online communication does not seem

to be carefully designed, given the frequent absence of marketing and communication plans. This may lead to a tactical use of the tools rather than a strategic one, which would be more effective.

For Spanish DMOs, the job title of the tourism professional responsible varies greatly; on average, three different departments intervene in the decision-making process; and the aims of the communication channels are not clearly differentiated. This suggests that internal organizational change is required to ensure that online communication strategies are strategically planned and sufficiently responsive to changing markets. In this regard, innovation is also required in terms of business behaviour (Sundbo, Orfilas-Sintes and Sørensen, 2007), in order to achieve competitive advantage.

With regards to the perceived usefulness of the online communication tools, official websites and social media are both prominent, although social media are rated as “very important” by almost three quarters of the sample. On the contrary, mobile applications obtain poorer results, as their perceived usefulness by DMO managers is less apparent.

Besides that, data revealed that DMO managers conceive official websites as an informational medium that can also be employed to build brand image. However, the interactive purposes, and the learning aspect from the analysis of the website usages are underestimated. Interesting results are underlined by the use of mobile applications, which do not stand out for any particular objective. Consequently, the importance and usefulness of mobile applications seem not to be perceived yet.

Results of this study contribute to literature on ICT adoption in the tourism sector, specifically within DMOs. Future research should investigate whether the actual approach to web marketing – which appeared to be internationally adopted - is useful or not, in order to enhance DMOs managerial processes, and in turn contribute to successful destination promotion through ICT.

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