

**International
Departures**
TERMINAL 3



Spanish Tourism Market Overview
"The overall recovery of outbound tourism"
January 2015



Tourism - Leisure - Lifestyle

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**Spanish Outbound
grows by 9%
during 2014
(January - August)**

**The expenditure of
Spanish travellers
abroad grows
by 9%**

**The domestic
expenditure in
tourism grows by
2.4% in Spain**

**The luxury sector
in Europe has
grown over the
past three years
by 28%**

**400.000 new rich
people in Spain
in 2014**

**International
Tourism grows by
5% in 2014,
according to
UNWTO**

**MICE Tourism
will grow by 2% in
Spain during 2015**

**Travelling is what
most excites the
Spaniards**

Key Statistics 2014 (from January to August)



| | | |
|----------------------|-------------|-------|
| Domestic Tourism | 97.733.267 | -2,6% |
| Outbound Tourism | 8.493.850 | +9,4% |
| TOTAL | 106.227.117 | -1,7% |
| TOTAL (Nov Forecast) | 141.000.000 | -3% |

Outbound Tourism Statistics in 2013

| | |
|----------|-------------|
| DOMESTIC | 144.527.252 |
| OUTBOUND | 11.245.964 |
| Europe | 8.671.338 |
| America | 1.235.388 |
| Africa | 982.487 |
| Asia | 339.043 |
| TOTAL | 155.773.216 |

Spanish Economy: presentation and main data

- Spain is a decentralized state with 17 Autonomous Communities and two Autonomous Cities in North Africa. Within the different regional traditional identities we find the Basque, Galician, Catalan and Castilian, among others.
- The Spanish economy until 2008 was considered one of the most dynamic in the EU, attracting significant foreign investment.
- The Service Sector plays a key role in the country's economy, contributing over 70% of total national GDP. The main trading partners are Germany, France, Italy and Portugal.
- The World Economic Forum in its Global Competitiveness Report 2014/2015 ranked Spain 35 out of 144 countries in the ranking.
- The World's Bank in its Doing Business Report 2014, ranked Spain in the overall ranking at number 33 of the 189 countries surveyed. Spain has improved in the last year reaching 73.17 points (maximum 100).
- Data recently published by the Bank of Spain reveal an improvement of GDP in 2014, in the third and fourth quarters they are at positive with an increase of 0.5%. For 2015 it is expected to continue improving with a growth of 2%.
- According to the semi-annual report Global Economic Prospects of the International Monetary Fund presented in October, the economy in Spain would grow by 1.3% in 2014 and by 1.7% in 2015.

Wealth in Spain

According to a report by Credit Suisse, the number of millionaires in Spain, people with assets valued at more than 740,000 euros, have grown by 23% in 2014. In total, the bank calculates an increase over 400,000 new rich people.

Tourism International Industry – Continued Growth

World Tourism remains strong

According to the latest UNWTO estimations published in December 2014, international tourism will exceed the forecasts made reaching 1.100 million of international tourists. Only from January to October the growth registered meant an increase of 5%. By region, the strongest growth was in the Americas (+ 8%), followed by Asia and the Pacific (+ 5%) and Europe (+ 4%).

Growth in Outbound Tourism

The Spaniards travel less within Spain and more abroad

The information provided by Tourspain regarding the travel patterns of Spaniards shows a slight decrease in the trips made in the first eleven months of 2014. While Domestic Tourism is the one recording a slight decline, Outbound Tourism continues the increasing trend of 2014.

Regarding the figures, the available data covers January to August, pointing a total of over 106 million trips (-1.7% compared to 2013), of which 97.7 million correspond to the domestic section (- 2.6% from the previous year) and 8.4 to the outbound with a growth of 9.4%.





And they spend more on trips abroad

Another positive information regarding Spanish Outbound Tourism is the expenditure, which increased by 9%. According to data published concerning The Balance of Payments, the Spaniards invested 9,860 million of euros between January and September traveling abroad, a positive variation of 9.3% over the previous year.

To this information is added the conclusion reached by the Cetelem Observatory of Consumption, showing a growth of spending by 2.4% of Spanish households, highlighting travel, health and technology. Also, according to the Barometer Cofidis of Illusion, a trip is still what most excites the Spaniards.

Our favorite destinations

The report released by Skyscanner about "Travel Trends" begins to highlight Central America and Asia as the favorite destinations for Spaniards. From Skyscanner they recognize that destinations like UK, USA, Germany, Italy and France remain the most visited by the Spaniards, but points out that grows the interest of these travelers to discover new countries.

Similarly, according to an analysis of Expedia it is expected that during 2015 the Spaniards will choose Domestic Tourism but a continue increase in bookings to exotic destinations such as Thailand and Indonesia.

How do we travel?

Of the total trips made by Spaniards in 2013, 72% were without reservation according to Tourspain. Regarding this data by type of trips, domestic tourism reached 24% of package tours with reservation, while in the case of outbound tourism this percentage rises to 69% of total trips.

Regarding length of stay, the average stays stood at 4,6 and 9,4 days for domestic and abroad trips, respectively.

The accommodation most used varies depending on the destination. Thereby, between trips within Spain has great relevance the stay with relatives and friends (42% of total stay) as well as their own homes (27%) and in third place hotels (18%). However, outbound tourism figures show a clear predominance of the hotel with 53% of stays, followed by the houses of family and friends (31%). Note that, although so far only accounts for 5%, vacation rental continues an upward trend both domestically and outbound.

When we sleep...

Hotels continue to have predominance as accommodation when traveling. In fact, according to a report by the consultancy Irea, investment in hotels in Spain during 2014 reached 1,081 million of euros, representing an increase in hotel investment of 37%.

Regarding accommodation, we can identify some trends that will mark 2015.

1. Vacation Rental: According to the consultancy Euromonitor International in its "Global Travel Trends Report 2017", the turnover of private accommodation in Europe will reach a volume of 11.000 million euros by 2017. According to the latest HomeAway balance in Spain the demand for vacation rental has increased by 25% in 2014.
2. Glamping: The idea is to combine glamour with responsible tourism. They are tourists with higher purchasing power, families and people over 65 the main stakeholders in this accommodation format with a high growth potential.
3. Luxury Hotels: According to the report from Digital Luxury Group, global search of luxury hotels increased by 7.7% last year, mainly in the United States and China.
4. Low Cost Hotels: In Spain only 4% of the hotels is low cost, compared to the 27% in the US and 24% in France. The basis of these properties is to eliminate services typically associated with the hotel (restaurant availability, amenities, etc.) to reduce the price, always fulfilling the minimum requirements of tourists (a good bed and shower, and good connectivity).
5. Poshtels: This type of accommodation combines the concept posh with the concept of hostel, so that by setting low prices the accommodation counts with contemporary design elements.

6. The hotel of the future: In part due to the varying behavior of millennials, the future hotels will eliminate certain aspects such as the workbench or tub for various technological upgrades as bluetooth in the mirror or digital art on the walls.

Honeymoon

According to an analysis carried out by TUI Ambassador Tours, the expenditure of the Spaniards in their honeymoon trips remains stable without resenting the economic situation, around 2.600 euros per person. The main booking months continue to be March and October.

Catalogues of Honeymoons of different tour



operators in Spain are taken by Indian and Asian destinations. On the other hand, due to the global economic uncertainty, consumers are becoming more sensitive to the price factor. This trend also affects couples who search for a destination for their honeymoon. For this reason, all tour operators include different discounts and new products in their honeymoon catalogues and more flexibility and customization.

Luxury Market

According to the report Luxury Travel Trends 2014 from Pangaea Network, the average expenditure per trip varies between 5,000 and 10,000 euros. The length of stay has decreased slightly, but a high percentage (69%) who hires packages including transfers and excursions is maintained.

People who do this kind of trips are generally couples and they are between 36 and 55 years, attracted by the privacy and exclusivity. The main destinations selected for luxury travel are Arab Emirates, South Africa, Oman, Brazil, India, Japan, Vietnam, Myanmar, USA, China, Indonesia, Thailand and Maldives.

According to the second report of the ECCIA, in collaboration with Frontiers Economics, the luxury sector in Europe has grown by 28% in the last three years, reaching a turnover of up to 547,000 euros. The luxury industry has been one of the growth engines of Europe in these three years, encouraging the creation of around 200,000 direct jobs and up to 1.7 million of indirect jobs. The luxury sector represents 17% of European exports.

In relation to the most popular sectors, the first is the high-end automobiles, with a turnover of 318,000 million of euros, followed by the personal luxury (clothing, accessories and cosmetics), the hotel sector and the sale of food and gastronomy. Regarding the gastronomic sector, the report highlights Spain as one of the countries with the greatest potential, thanks to the sale of products such as wine and oil.

It also highlights a change in the tourism industry of luxury where opulence and ostentation disappears while the tourist's experience is more and more relevant. New rich, more discreet, are accessing this market and demanding special and personalized treatment, so the concept of luxury is interpreted in multiple ways.

Gastronomic Tourism

Spain leads the ranking at European level where the gastronomic offer is "a key factor" when choosing a destination, according to the report 'Food Tourism 2014' by Pangaea Network. 66% of professional surveyed consider that culinary experiences are a key to the traveler visiting these countries when choosing the destination.

82% of the professionals surveyed in this study assessed Spain as an attractive destination for its gastronomy, ahead of the UK (73%), Italy (61%), France (60%) and Germany (55%).

In relation to the growth of the sector, four out of ten of industry experts surveyed documented "small" increase in the last three years and 38% reported a "significant" increase.



Regarding the duration of the trip, gastronomic tourism is more associated to getaways or city breaks for two or three days (58%), above trips of a week (23%) or same day trips (7%).

Within the expenditure made, 45% of those surveyed establish the average expenditure during the trips of this type of tourists between 100 and 250 euros a day. 19% said that the average cost does not exceed 100 euros. Regarding the tourist profile, visitors are mostly between 36 and 55 years (38%), followed by those who are over 50 years (30%) far away from those who are between 20 and 35 years (15%). The trips are purchased in pairs, in half of the cases, followed by groups of friends (18%) and associations or clusters (18%).

LGBT Tourism

Madrid was named capital of gay tourism this past 2014, embracing the 31st World Gay Tourism Convention. The LGBT tourism in Spain represents 10% of global volume of travelers and 16% of expenditure. It is an affluent market that spends 40% more than the rest and moves in any time of the year. With regard to the region, the gay tourism represents an annual average turnover of 700 million euros.

In the Top10 of the favorite LGBT tourists destinations in Europe, there are two Spanish cities. Barcelona is the fifth largest city, behind Amsterdam, London, Paris and Berlin. Madrid is seventh after Rome.

At the same time, Spain has been named the most gay-friendly country of 40 countries analyzed in 2014 by the Pew Research Center's Global Attitudes Project. Along with Spain were evaluated countries like Germany, France, Italy, Argentina, Chile, Canada, USA, Australia, Japan, United Kingdom and Czech Republic. The study concludes that Spain is currently one of the most open countries to all sexual tendencies.

Also, note that the celebration of World Gay Pride, held every three years, will take place in Madrid in 2017. The city was unanimously selected among more than 80 delegations that voted.

On board

According to data released in June by CLIA, the contribution of the cruise industry to the European economy has grown by 4% in 2013 and 22% from the beginning of the crisis in 2008. And it grows in all aspects of their business, both as inbound and outbound, employment generation and port activity.

The cruise industry presented its conclusions regarding trends that will shape the industry in 2015. These include the expected growth and resistance to the crisis, the types of boat (better and more technological) and the bet for the winter season, among others.

The most important destination for major cruise is the Mediterranean; this is still the number one. It will always have a great appeal and will be the favorite of Spanish passengers. Moreover, it appears that many passengers have begun to choose exotic destinations like the Caribbean, UAE, Asia and Australia, as well as cruises in the Nordic countries (Baltic Sea).



Moreover, according to Pullmantur, the cruise industry in Spain, has established itself as a source of income. It is expected that by 2015, 1 in every 10 people who will visit Spain, they do it onboard a cruise. In the past year, Spain received 63 million of tourists and more than five million passengers were onboard a cruise. Forecasts indicate that the figure will rise to 7.7 million cruise passengers this year, placing Spain as the second country in the European Union that receives more cruise passengers behind Italy. Barcelona and Palma de Mallorca are the major ports, with the arrival over the past year of 1.8 million and 1.2 million of tourists respectively.

MICE

According to data obtained after EIBTM held in November in Barcelona, congress tourism, conventions and incentives in Europe does not provide a clear growth in this 2015 due to problems such as economic uncertainty, the crisis in Ukraine or Ebola as they are factors that hinder the progress of this sector in Europe. Still, it is expected that the expenditure on the five key markets of the European region, Germany, UK, France, Italy and Spain, reach 157,000 million in 2015.

Against the negative data on Europe it highlights the good view of Spain within this sector. According to data released by the report by the American Express Travel agency in Spain a growth of 2% in this sector is expected.

The number of corporate events will increase by 2.6%, while the incentives sector will experience a growth of 2.1%. It also highlights the length of incentives, being five days, two more than the European average. It is also anticipated that the meetings organized by the sales and marketing of Spanish companies will increase by 3%.

For 2015 it is expected the expenditure abroad to fall by 4.2%, and that growth will occur more in Spain in order to save money and time on the road. In general, Spanish companies that most spending will allocated to the chapter of MICE & Business Travel will be those related to the sectors of food, finance, distribution, energy, chemical and pharmaceutical, new technologies and logistics / transport. In a second level of spending, construction companies, healthcare, graphic and textile arts will be placed, according to the data handled by IBTA.



Main Destinations 2015

Emerging Destinations 2015



Those arriving... Inbound tourism

In the first eleven months of 2014 Spain has received 61.7 million of international tourists, an increase of 7.2% compared to 2013. The main markets are the UK, France and Germany, while countries with higher growth are Belgium and Italy.

During these months the average expenditure per tourist is 969 euros (110 euros per day) reaching 59,810 million of euros, 6.7% more than the same period last year.

By Autonomous Community of destination, the favorite among foreign tourists was Catalonia (one in four tourists visiting Spain), followed by Balearic Islands (18.3%), Canary Islands (16.9%) and Andalusia (13.2%).

What connects us?

Internet – Spain

According to the report of the National Institute of Statistics October 2014, 74.4% of Spanish households have access to the Internet, up from 69.8% the previous year. In Spain there are nearly 11.9 million households with Internet access.

Regarding the type of Internet connection, 73% of households (nearly 11.7 million households) use broadband (ADSL, cable network ...) which represents an increase of almost 800,000 households compared to the previous year. The narrow band has a token presence.

For the first time, the main type of Internet connection is mobile broadband connection via a handheld device (mobile phone -at least 3G-, etc.), with 67.2% of households with access. Then ADSL (66.2%) online and network cable or optical fiber (20.9%) is leaving in the last place mobile broadband modem via USB or card (7.0%) and other fixed broadband connections such as satellite, public WiFi or WiMax (6.5%).

Internet User Profile

The use of ICT by people being from 16 to 74 years old:

73.3% of the population has used the computer in the last three months, representing nearly 25.3 millions of people and an increase of 1.5 percentage points over the previous year.

Regarding the use of Internet, more than 26.2 million people, 76.2% of the population, have used the Internet in the last three months, overcoming 4.6 points higher than the previous year. For the first time, the percentage of Internet users exceeds PC users. 81.7% of Internet users declare to have used some type of mobile device to access the Internet.



Frequent users (that connect to the network at least once a week) account for 93.5% of all Internet users. These users are approximately 24.5 million people, representing 71.2% of the population. The segment of intensive users (daily use) totaled 20.7 million people, 60% of the population aged 16-74 years.

Trend of e-commerce

E-commerce in Spain continues to increase progressively. According to the report prepared by the National Commission of Markets and Competition (CNMC), sales continue to gain weight in overall trade at high speed, reaching in the first quarter of 2014 a turnover of 3,579 million of euros, 27% more than in the previous year. The size of the sector has almost tripled

since 2009 (+ 190%) and the number of purchases increased by 35% in the last twelve months to almost 59 million transactions carried out in the quarter.

Online businesses related to tourism, such as transport ticket and room reservations continued to lead the industry in the year under review. Travel agents, tour operators, hotels and airline tickets lead with over 27% of trade, representing a quarterly turnover of 1,000 million of euros.

Sectors such as direct marketing and online advertising, textiles and the purchase of books, newspapers, music, applications, digital services and telephony are growing considerably. The report highlights the textile sector that grows faster, reaching 5% of the online billing.

The firm eMarketer expects the Spanish e-commerce turnover nearly to double in the next two years, reaching 30,000 million per year in 2016. This figure puts Spain as the European market that will grow the most between 2013 and 2017.

On the other hand according to data from Ecommerce Europe, the average annual expenditure of Spaniards is 865 euros, compared to 1,243 euros from the European average. The report also notes that Spain still remains far from European leaders as the United Kingdom (107,000 million), Germany (63,000 million) and France (51,000 million of euros).

According to the Observatory Cetelem eCommerce published in December 2014, the top 5 of purchases made on the internet in the last 12 months are as follows: travel (57%), tickets to shows or entertainment centers (54%), telecommunications (48%), books / music (43%) and electrical / technology (44%).

The average expenditure on travel purchase is 678 euros, half the average amount in general, which is 1,330 euros. Consumers aged between 35 and 44 years are those who declare a major expense (1,798 euros).

The average payment most used was PayPal to 71% of buyers, followed by debit cards for 51%. The bank transfer and cash on delivery rank third in the ranking, with 24% of mentions in both cases. With regard to credit cards, the payment mode at end of the month is quite used, 20% of online shoppers declare to have paid some of their purchases with it.

Social Media

The report of the National Institute of Statistics from October 2014 reveals that 67.1% of Internet users participate in social networks generally as Facebook, Twitter or Tuenti, being young people aged 16 to 24 years the most active (91.3%). Regarding gender, participation is higher in women than in men, with 68.9% and 65.3%, respectively.

On the other hand, the main findings of the VI Report of the Observatory Social Networking (October 2014), by the media agency Arena and The Cocktail Analysis, 90% of Spaniards access social networks, data that is stable since 2011.

Using Twitter starts to get bogged, even though 41% of Internet users have an active account, it fails to capture new users, only 12% of users have opened their account in the last year. However social networks like Instagram or LinkedIn begin to rise around 20% and 18% of users, respectively. WhatsApp exceeds the volume of Internet with active account for Facebook, the social network for excellence, with 87% versus 83%. On average each user has 2.3 active accounts in social networks.

Social networks are accessed from different devices while mobile and tablets gain ground against the computer. In 91% of daily users connect to social networks from one device. Specifically, 81% accessed from the computer, 75% use smartphones and 38% through tablets.

The presence of brands in social networks favors the transparency image of the brand, gaining importance in the role of post-purchase.



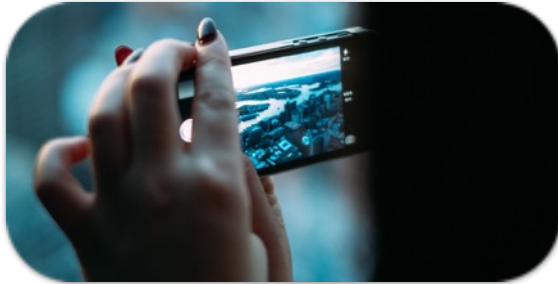
Facebook is perceived as the most appropriate social network for any action with the brand and product information and Twitter as speaker of the experience or the approach to complaints. 27% of users access social networks for this purpose. Two out of three users follow brands and 25% actively interact with them.

Furthermore 56% of Internet users have stopped following brands on occasion due to perceived misuse of advertising content.

Some social networks that are not successful are Google+, Pinterest and tumblr.

Mobile Market

Data from the report prepared by Deloitte Global on mobile consumption in Spain in 2014 concluded that Spain is one of the most advanced countries in terms of mobile phones. 83% of mobile phone users have smartphones, placing Spain as the fourth of developed countries in penetration of smartphones, with 85%, behind Singapore (89%), South Korea (88%) and Norway (87%).



Furthermore according to a report from September 2014 belonging to The App Date, Spain remains the European country with the highest penetration of mobile devices (both smartphones and tablets) with 66%; a fact that has faithfully reflected in the activity taking place in the markets and in which daily 4 million of applications are downloaded to tablets, smartphones and SmartTVs.

Specifically, 23 million users in Spain are considered assets and, therefore, they use or download applications on their mobile devices and smart TVs; an important niche for developers and businesses.

It also highlights the Google mobile operating system, Android, as the leading system in our country, reaching 89% market share, leaving behind iOS 7.6%.

Travel Bloggers and Social Network

Internet use appears to be the main source of information for travelers when planning a trip, the contents of travel blogs are becoming more consulted, largely because it is written by travelers who share their experiences and recommendations for excursions accommodation, restaurants and all kinds of practical advice. Also, social networks and platforms on travel have boomed in Spain as the cases of Minube or El Viajero Fisgón, among others.

The movement of travel bloggers in Spain, after the initial super-boom, still seeks its consolidation with an apparent saturation in recent years (compared to markets like UK, Germany ...). The blogs linked to traditional media in their online version offer a more secure proposal (as a rule, associated to media

journalists are who have greater influence on travelers seeking high end trips information and long haul destination through this format). Meanwhile, independent leaders bloggers have more weight concerning close destinations or budget options, but in order to demonstrate their role as "influencers in luxury travel and long haul destination", they still have the unfinished business to consolidate audiences metrics accepted generally and best practice that demonstrates its influence on the most profitable segments of the market and its ability to influence decision-making and tourists and domestic travelers purchases.



Tourism trends 2015

The companies of the tourism industry and destinations are rapidly adapting to the current economic situation, with concentration processes, new synergies between brands, low-cost strategies and products increasingly segmented.

Customization: As noted the experts at the World Travel Market, customers look for a customized service not only regarding luxury. Thanks to the increase of technology, customization is extended to mass tourism, offering travelers more flexibility when deciding through which channels they close the book, how they fly, what excursions hire, the hotel room what they want...

Halal Tourism: According to the report The Muslim Travel Index 2014, Spain is in sixth place in the ranking of the most desired destinations in Europe by Muslim tourists from Saudi Arabia, the United Arab Emirates and Malaysia. Muslim tourists configure another emerging segment that increasingly arouses more interest in the tourism industry globally. Potential consumers of Islamic tourism or "halal" (acceptable in Arabic) are also among the 14.2 million Muslims in Europe.

Shared transportation: Low cost model has moved to a new growing trend. They have emerged different platforms where users plan their trips so that other users can join and share the cost of travel in a private vehicle, as is the case for BlaBlaCar. In the same line of the denominated collaborative economy, the company Uber has revolutionized the transfer market, competing with taxis in short transfers in large cities.

Women-only: The trend women-only does not stop. The range of products and services designed for women traveling alone continues to expand, for example taxis in New York and destination guides just for women.

MAMIL: They are American and Europeans middle-aged men in an affluent economy, but their way to enjoy leisure time and outdoors are quite different from their parents. They prefer to go in tights and ride a bicycle. Mamils (middle aged men in Lycra) and new patterns of leisure pose a challenge for golf tourism.



Braggies: One of the new words most used in Spain, selfie, has created a new concept of tourism. From the verb "to brag" comes the need to offer tourists the chance to post their selfies while traveling as fast as possible. To meet this demand the hotel chains are committed to offer free wifi services and even vouchers for customers to share their stay in social networks.

Wellness: Among the top 10 trends in this segment they are included the therapeutic use of cannabis and its progressive legalization, Islamic traditions wellness including nutrition in addition to hammams, social fitness and hiper-costomisation of beauty treatments, to name a few.



Communications and marketing trends 2015

People move faster than marketing and so solutions that combine the thought and action are needed: one marketing where the human being is the center of everything, more experiential, emotional, dialogued and humanist.

A global industry, constantly moving and very sensitive to international crises, such as tourism and leisure, requires constant strategic analysis and specialized understanding that achieves build trusting relationships between brands and their internal and external audiences.

In this line of thought, we identified some of the key trends 2015.

Best regards,

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Strategy... first

It is appearing new paradigms and strategic thinkers who are reviewing and reinventing strategic thinking (Management Lab / MLab / the New Strategic Theory / NTE / ...). Understanding that the key to all strategic theory involves recovering human beings, conceiving the strategy as a science of the relationship and social articulation and not as a science of conflict and war. Putting in place of another and thereby giving a guidance strategy more conversational, negotiating, cooperative and consensual, providing more articulating new rules. In this scenario the communication has come to play a constitutive role (co-construction, connectivity and co-evolution). New words that match new approaches.

The human being at the center of everything:

The brand has to be able to deepen the relationship with the client, so that the product or service entails an experience. Thereby, the communication should be more human, explore new avenues of cooperation that maximize ROI and achieve the association of the brand and product with an experience close to people.

Integration - The PR are revalued at the Social Networks: the role of public relations based on comprehensive strategic communication is revalued as a way to give the necessary strategic planning and implementation of campaigns in the era of multi-support consistency.

"Mobile" formats and production of audiovisual content: Spain is the fourth of developed countries in penetration of smartphones, with 85%, behind Singapore (89%), South Korea (88%) and Norway (87%). Therefore tourism companies which have neither their web nor marketing adapted to mobile format will lose promotional competitiveness in 2015. Also, Youtube stands as the second most used search engine, showing the fast growth of video as source of information. Good management of the videos on Youtube brings several advantages, among which the SEO positioning other search engines, user retention and increased reserves. In fact, in 85% of cases, a user is more likely to book a trip or tour if he has seen a quality video. Moreover, the negative trend of television with a schedule explains the upward trend of the new audiovisual consumer, more selective when looking for videos of interest.

More involvement in social networks: Facebook, Twitter, etc. have become a basic tool for managing the relationship with the customer. It notes that 75% of travelers update their social networking profiles while they are on the trip and that 55% brands generated bookings through social networks.

Investing in image and design (computer graphics, high quality photos...): People are more attracted and pay more attention to those contents accompanied by visual information, either photography or graphic design. Thereby, to use good quality photographs will increase the interest in the product or destination and improve sales. As a note, if it is a destination it is important to mention that these images must show people also, as part of the destination.

Deeper into local content: Provide detailed information at the local level improves the confidence in the brand as well as the online traffic, because 48% of tourists look for local activities and restaurants nearby and a third of the searches are performed in specific areas. The blogs (corporate, media and independent) from Expatriate Nationals talking about their new city and country of residence are on an upward trend.

Payment for reinforcement required: "Cheapness is expensive". After a review of the platforms on which is located the target audience, specialized studies report that campaigns which are complemented with payment strategies obtain better results. Implementing paid strategies reinforces the message and increase awareness and commitment from the audience.

Sources consulted

UNWTO · INE · CNMC · Tourspain · Bank of Spain · International Monetary Fund · Euromonitor · Ecommerce Europe · Pangaea Network · CLIA · IBTA · American Express Travel · Excellence Fair · VI Ola del Observatorio de Redes Sociales · Deloitte Global · The App Date · Convención Internacional de Turismo LGTB · Pew Research Center's Global Attitudes Project · Homeaway · Skyscanner · Cetelem · Cofidis · Hosteltur · Agenttravel · Lonely Planet · Viajar ·



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The Blueroom Project (TBP) is the specialized Agency in Communication, Marketing and Tourism Representation in Spain, working for a wide range of clients, from small independent hotels and resorts to multinational hotel chains, airlines, airports, cruise lines, tour operators, agencies ... and representing some of the main tourist destinations in the world. Our goal is simple - to achieve measurable results and a significant return on investment through innovative strategies and campaigns. The experience, training and communication and marketing contacts accumulated from reputed destinations, leisure and lifestyle business, citymarketing and representations of institutions and tourism companies during 20 years of work, enable us to provide a comprehensive view with significant added value. Furthermore, through our partners and our global international network Pangaea Network you will also enjoy a worldwide scope in 27 international markets.

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